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MONTANA EMPLOYMENT AND LABOR FORCE

MONTHLY REPORT

JANUARY 1978

STATE OF MONTANA

THOMAS L. JUDGE, GOVERNOR

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Volume 8 Number 1

Produced by:
Research and Analysis
in cooperation with the
U. S. Department of Labor
Employment and Training Administration
and Bureau of Labor Statistics

GLOSSARY OF TERMS

1. Civilian Labor Force - the number of persons 16 years and older, defined as employed or unemployed, excluding members of the Armed Forces.

2. Employed - those persons who work for pay or profit during a week or, as unpaid family workers, work 15 hours or more during a week. Also included as employed are those who, although not working, had some job attachment and were not looking for work, including persons temporarily absent from a job due to illness, bad weather, vacation, or labor-management dispute, whether or not they were in a pay status during their time off.

3. Unemployment - the number of persons who, for an entire week, did not work at all, were able to work and available for work, and (1) were looking for work or (2) would have looked for work except that (a) they were waiting to return to a job from which they had been laid off, or (b) they were waiting to report to a new wage and salary job scheduled to start within the following 30 days (and were not in school during the week).

4. Unemployment Rate - the number of unemployed expressed as a percent of the civilian labor force.

5. Residence Data - a count of employment by where people live.

6. Establishment Data - a count of employment by where people work.

7. Seasonally Adjusted Labor Force Series - to facilitate the evaluation of the labor force, recurrent yearly movements have been isolated and removed by the Bureau of Labor Statistics seasonal factor method.

8. Composite Index - an aggregate of six leading indicators. The indicators used are: Manufacturing - Employment, Average Weekly Hours, total Accessions and Layoffs; Average Weekly Initial Claims; and statewide Building Permits. A reverse trend was used for Layoffs and Average Weekly Initial Claims. This composite index is in no manner or form comparable to the United States composite index as published in "Business Conditions Digest", U. S. Department of Commerce.

9. Real Spendable Average Weekly Earnings of Private Nonagricultural Production Workers - represents the earnings of a hypothetical individual after deductions for State Income, Federal Income and Social Security taxes, and adjustment for change in purchasing power since 1967. This individual is assumed to be sole support for a family of four, earn the average weekly gross earnings of production workers in Montana's private nonagricultural industries, and take standard deductions on State and Federal income taxes. Taxes were computed using standard tax tables, and purchasing power was adjusted by deflating Spendable Earnings based on the national Consumer Price Index.

10. WIN - Work Incentive Program for Aid to Dependent Children recipients.

11. CETA - Comprehensive Employment and Training Act of 1974.

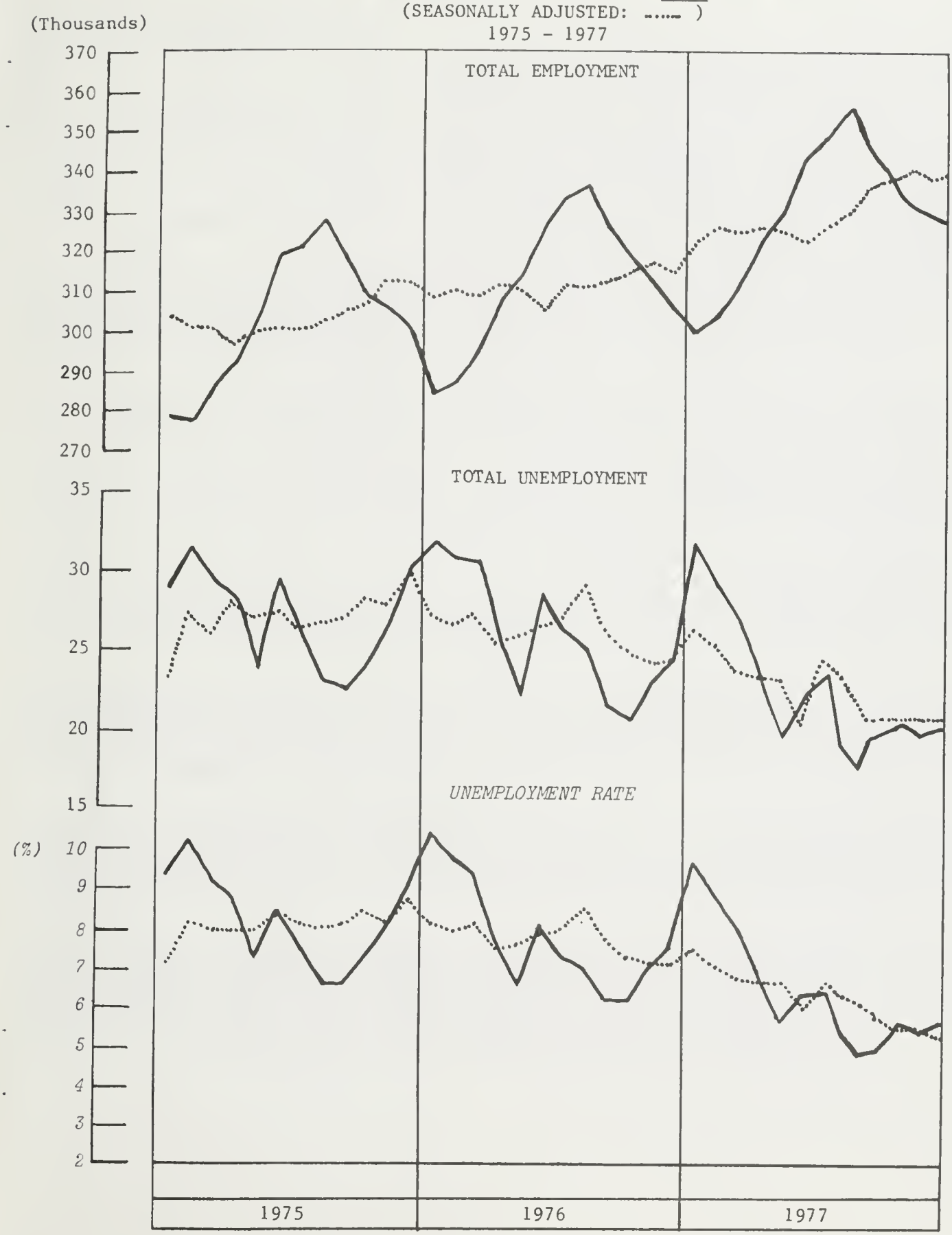
12. CETA-CEP - Concentrated Employment Program funded under the Comprehensive Employment and Training Act.

13. SMSA - Standard Metropolitan Statistical Area as determined by Office of Management and Budget. Must have a central city with population of 50,000 or more.

14. LMA - Labor Market Area as determined by the Montana Employment Security Division consists of a central city or cities with population of less than 50,000, and the economically integrated geographical area surrounding it.

MONTANA EMPLOYMENT, UNEMPLOYMENT, AND UNEMPLOYMENT RATE

(NOT SEASONALLY ADJUSTED: ____)
(SEASONALLY ADJUSTED: .....)
1975 - 1977



HIGHLIGHTS: 1977

During 1976 Montana exited the recession at a leisurely pace - not an unexpected performance for an economy that historically lags behind national trends. However, early in 1977, when most of the nation was dealing with harsh winter weather, Montana was in the middle of an economic resurgence. At the heart of this was the construction industry. Local demand for housing spurred building activity while national demand breathed new life into the lumber and wood products industry. The heightened activity in the lumber industry subsided during the third quarter, yet local construction maintained a strong pace well into the later months of the year. Throughout 1977 most sectors of Montana's economy displayed a positiveness that was not present at the national level. Montana's unemployment rate averaged 6.1%, while the national rate hovered above 7.0% for most of the year.

Since December 1976 total employment in Montana has increased over 17,000 individuals - an annual growth rate near 5.5%. At the same time employment at the national level increased only 4.7%. During the past twelve months (December 1976 to December 1977) significant increases have been noted in jobs in local government (up 15.4%), contract construction (up 21.3%), lodging places (up 21.1%), and food and kindred products (up 10.8%). On the other hand, agricultural employment remained virtually unchanged with 24,400 individuals employed in both December of 1976 and 1977.

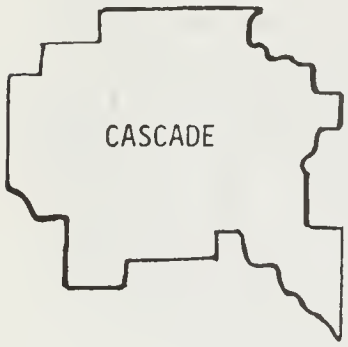
The results of the drought conditions of the past year have not completely dissipated. However, recent precipitation has aided recovery of soil moisture content, and spring runoff should provide improvement in stream and reservoir levels. At present the crisis in hydroelectric power seems to have dissolved.

Farmers and ranchers have an additional problem - dwindling cash receipts. The Montana Crop and Livestock Reporting Service reported that during 1976 net income in agriculture dropped 28% from 1975. The prospects of increases this past year also seem non-existent in light of market conditions. Production costs continue to escalate, and crop and livestock prices continue to show no consistent upward movement.

The remainder of the economy displayed more positive signs. Along with the increases in employment we have seen sustained increases in real wage levels during the year. This may be due in part to the ability of many Montana communities to continue to attract new out-of-state businesses which upgrade and further broaden the existing economic base of the state.

It appears now that Montana's economy is on an expansion course. The ultimate degree of growth, however, is dependent on random events. It is safe to assume at least a modest 2% to 3% growth in employment during the first half of 1978, but forecasting the effects of weather, farm prices, labor disputes, and energy shortages is virtually impossible. The outlook is favorable and warnings of another recession are premature at best.

GREAT FALLS SMSA (Cascade County)



Employment and Unemployment Situation:

During 1977 virtually every figure representative of employment and unemployment in the Great Falls SMSA was much improved over the previous year. With 32,172 people, the civilian labor force was at its lowest point in January, but it continued to increase during each successive month until its highest level of 35,830 last July. The average for the entire year was 34,450, a substantial increase over 1976's average of 32,096. Employment, too, was at its lowest level in January, and its highest in July. The month to month movement of employment resulted in an annual average of 32,406 persons at work during the year, as opposed to the 1976 average of 29,490. These various employment and unemployment patterns resulted in an unemployment rate of 5.9% for the year. This represents a decline of 2.2% from 1976, and is a very positive indicator of the relative economic improvement of the Great Falls SMSA during 1977.

Economic Highlights 1977:

By most standards, the past year has been an excellent one for the economic health of the Great Falls area. Accompanying the decline in the overall unemployment rate were activity increases in the business and construction sectors, which were the bright spots of the local economy in 1977. For the year, 508 new businesses were established in the area, compared with 310 new firms in 1976. This represents an increase of 64% and is thus a strong positive indicator of improved conditions in Cascade County.

The construction sector has been the mainstay of employment and monetary distributions in many localities during the past year, and Great Falls is no exception. Residential building permits issued were many, with a good increase in the demand for homes and apartment dwellings. More than one large-scale multiple-dwelling complex was constructed in the area at costs of more than $1 million. Projects of this size serve to distribute very large amounts of money throughout the economy. In addition, a number of non-residential projects of considerable economic impact were undertaken during the year. Though this part of the construction sector was not as strong as residential building, it nonetheless provided impetus with major projects such as airport improvement, bridge construction, and recreational facilities for the county.

The area did experience some adverse conditions, in the form of labor disputes during the year. Four different disputes arose which affected varying numbers of workers, including construction laborers, smelter workers, city employees, and those working on missile site improvements in the vicinity. The problems in each case were resolved, however, without long-lasting hardship for the parties involved, and leaving the economy of the SMSA in a sound state.

BILLINGS SMSA (Yellowstone County)

Employment and Unemployment Situation:

In terms of the labor market, the Billings economy showed another strong performance during 1977, boasting a year-to-year growth rate of 5.5% for the civilian labor force which climbed to an average of 52,000 persons for the year. At the same time, total employment rose by an even larger margin, 6.9%, or 3,200 workers, ahead of 1976 levels. An average of 49,600 persons were employed in the area during 1977. The employment gain was reflected in all of the major industrial sectors, with the government and wholesale-retail trade industries accounting for the bulk of the increase, 1,800 of the 3,000 additional workers. Manufacturing and services followed with increases of 400 each, while the construction, transportation, communication and public utilities, and finance, insurance and real estate industries experienced a combined increase of 400 workers.

The jobless rolls also reflected a positive stature for 1977. Average monthly unemployment leveled at 2,400, which is a distinct improvement from the 2,900 figure for 1976. The combination of the improvements among the employed and the unemployed caused 1977's jobless rate to fall to 4.6%. The situation is further accented, when it is considered that most of the improvements took place during the second half of the year, when the rate did not edge above December's high of 4.2%.

This county has experienced an average growth rate in the civilian labor pool of roughly 4.5% during the 1970 - 1977 period. The 1977 rate, however, surpassed this growth average, with a 5.5% rate. An additional 3,000 workers were added to ranks of the job-holders during 1977, which indicates the strength of the Billings economy. The recession only slowed a rapidly expanding job market. But, as the figures show, Yellowstone County remains the State's major growth center.

Economic Highlights 1977:

In retrospect, the Billings local economy enjoyed a very good year during 1977, with a strong resurgence of economic growth in the third year of recovery following the 1974 recession. Trends in two primary facets of the economy, the job market and the business community, each support this observation. As already noted above, the job picture definitely showed improvement during the year. In terms of commerce, a total of 781 new businesses entered the Billings SMSA during 1977, which represents a gain of 33% from the 1976 total of 583. This definitely portrays economic expansion, although it must be stated that the feverish pace of the first half of the year was not maintained. At that point, business formations were 58% ahead of comparable 1976 levels.

Building permits, an indicator of general construction activity, also noted positive trends. The number of permits issued during 1977, totaled 1,808, 6.5% above 1976, when 1,698 permits were issued in the city of Billings. The 1977 building valuation reached $53.2 million, compared with $46.5 million for the previous year. Specifically, permits were issued for 895 single family homes, 101 multi-family units, and 120 commercial-industrial facilities. The multi-unit residential dwellings included 72 duplexes, 10 four-plexes, two seven-unit apartments, five eight-plexes, two 10-unit dwellings, one 12-plex and an 18-unit apartment. It must be remembered that these totals include only structures within the Billings city limits.

BILLINGS SMSA (Yellowstone County)(Cont.)

As reported in earlier issues, new car registrations have been the lone negative indicator for this area, as registrations have been off 1976 figures throughout the year. The gap, however, had been narrowing since late spring. At year's end, the total reached 4,713, down only 2.6% from last year's total of 4,841. This is a favorable indicator as compared with the state as a whole, which experienced a 13.2% downturn.

ANACONDA - BUTTE LMA

Employment and Unemployment Situation:

In 1977, the unemployment rate averaged 7.7% for this labor area, which represents a considerable improvement from 10.1% recorded for 1976. All six counties shared in the improvement, although the rate is still high by any means of economic determination. Those counties with the highest rates of joblessness include Silver Bow, with a 9% rate; Granite, 9.2%; Deer Lodge, 8.2%; and Powell, 6.9%. All of these counties have a common economic base with mining and/or manufacturing, particularly copper mining-manufacturing and lumber-logging industries. As such, the frequent sales downturns in these industries have contributed to the prevalent labor surplus in these areas. On the contrary, Madison and Beaverhead counties are primarily agriculture and trade based economies. These industries are less subject to the ups and downs of the business cycle, in terms of employment. For this reason, Beaverhead county's 1977 unemployment averaged only 3.6% and Madison experienced a 5.1% rate. In 1976 an average of 3,600 persons were unemployed in this labor area, while in 1977 there was an average of 2,700 unemployed workers with nearly 60% from Silver Bow county. Those employed included 32,100 persons, 300 more than one year ago. The decline in the jobless rolls more than offset the employment gains leaving a net loss for the civilian labor pool - 34,800 persons for 1977 and 35,300 in 1976.

Economic Highlights 1977:

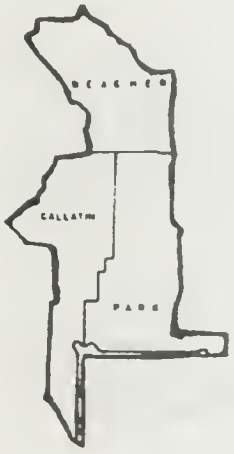
In terms of new business formations, the area economy is in much better shape than a year ago. A total of 314 firms entered the six-county area during 1977, which compares with 254 new firms for 1976, or an increase of almost 24%. This closely followed the trend for unemployment, as all six counties experienced improvement during the same period. Also related to the surge in new business formations is the expansion of the construction industry. This industry generally fared well during 1977 with the increased demand for residential as well as business space. Probably the brightest spot in the economic picture during 1977 was the decision to construct a Magnetohydrodynamics Research facility in Butte. The cost of the project is expected to reach $20 million for the construction phase alone. About 100 construction workers were employed on the project at year's end, and this should move to 200 by middle 1978. The home building industry also experienced a good year, with the low interest state financed mortgage funds providing added stimulus to an already active housing market.

The lumber and wood products industry is the most dominant in Powell, Deer Lodge and Granite counties. The closure of several mills over the past several years has caused severe labor problems to the already over-supplied labor market. However, during 1977, one of the mills reopened and a national building boom helped carry area mills through a fair year in terms of production and employment.

ANACONDA - BUTTE LMA (Cont.)

The copper industry again highlighted the bulk of the economic news for this labor market area, particularly smelting and refining in Anaconda and open pit mining in Butte. The year opened with the acquisition of the State's large copper firm by a major energy-related concern. Along with the sale came fresh speculation of a shutdown of Montana mining, or possible capital spending plans, neither of which occurred. Nationally, the copper industry had been plagued by higher costs and low market prices for several years. By last spring the price of copper rose to near profitable levels, (74¢ a pound). As it turned out the price increases were just temporary, as stockpiling occurred in anticipation of a labor dispute when the three-year contracts expired on July 1, 1977. The labor dispute did occur, although in Montana a settlement was reached in about three weeks. By year's end the price of copper was down again (65¢ a pound) and further production cutbacks became a reality.

BOZEMAN LMA



Employment and Unemployment Situation:

The tri-county Bozeman LMA showed mixed trends in its employment situation this year compared with 1976. On the negative side, the 1977 average for the civilian labor force was 24,737, 1.8% less than last year's average of 25,203. At the same time, the average number of persons employed this year was 23,427, slightly less than the 1976 figure of 23,494. These negative aspects of the employment situation are overshadowed, however, by the decline in the number of persons who were unemployed during the year. That average dropped from 1,709 last year to 1,310 for 1977, and brought the calculated average rate of unemployment to 5.3% for the year. This is a very positive turn of events in light of the fact that the 1976 average unemployment rate was 6.8% for the Bozeman area. This year's rate also compares well with the statewide average of 6.1%.

Economic Highlights 1977:

The 1977 Bozeman area saw a number of general improvements in its economic climate. Reports on bank debits through June indicated consistent increases over previous year levels. Bank debits are one indicator of the amount being spent on goods and services in an area, and as such, the increases are a positive economic factor in this region.

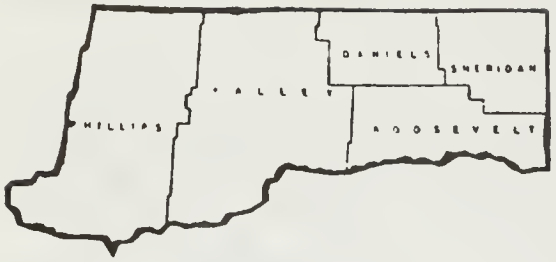
New business formations offered another solid indication of economic health in the Bozeman LMA during the past year. With 427 firms started during 1977, a 46% increase was realized over 1976 levels, implying a strong trend of improvement in this aspect of business activity.

As in many areas statewide, Bozeman building was booming during the year, with a surge in residential construction supporting much of the business in that sector. One of the more prominent non-residential building projects of the past twelve months was a $1.5 million contract for work on an airport terminal to service the greater Bozeman area.

Generally, the three county LMA enjoyed a good year in 1977. An economic highlight of the summer was a trailer caravan rally attended by some 10,000 persons. The get-together reportedly pumped an additional $3 million into the area.

Finally, with a very good ski season on hand, area commerce ended the year on a sound note and began the new year in similar fashion.

GLASGOW LMA



Employment and Unemployment Situation:

In 1977 the civilian labor force for the Glasgow labor market expanded by over 700 individuals, but, more importantly, employment rose an average of nearly 5% for the year. Thus, the computed unemployment rate fell to 5.6%, well below the rate of 6.1% for 1976. Despite this overall improvement in the statistics for the entire area, Daniels and Valley counties actually displayed slight increases in the rate of unemployment, with 1977 average rates of 2.9% and 8.8%, respectively. The remaining counties of Phillips, Roosevelt, and Sheridan showed marked improvement, with Roosevelt standing out as the major beneficiary of employment increases in the labor market. Here employment increases averaged almost 800 workers over the year, forcing the unemployment rate to 5.1% from 6.4% in 1976.

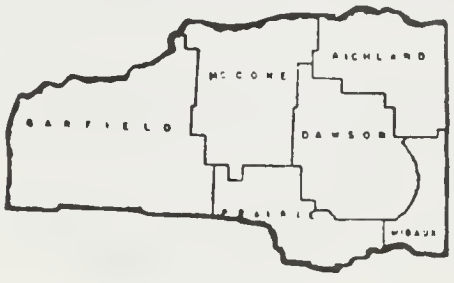
Economic Highlights 1977:

As was the case statewide, the bulk of the economic activity for 1977 in the Glasgow labor market centered on the construction industry. A new hospital in Glasgow contributed to the general health of the local economy, while on the western edge of the LMA in Phillips county, construction of a new natural gas line helped fuel an expanding job market. Other notable undertakings in the area included a senior citizen center, a bank, a sewer project, and a large housing project.

While these construction activities have provided additional stimulus to the economy, possibly the most significant event in this part of the state was the decision to redevelop the old U. S. Air Force facility in Glasgow. Business leaders are hoping to attract light manufacturing or related industry groups, but at present the status of any new business relocations or formations is still up in the air.

Other indicators of economic growth have not been so positive. Particularly, new car registrations signaled a turn toward a course of moderate demand for durable goods in the retail sector, and bank debits, a rough measure of consumer spending, were held in check for most of the year.

GLENDIVE LMA



Employment and Unemployment Situation:

During the past twelve months, all figures for employment and unemployment in this LMA showed improvement over 1976 levels. The unemployment rate, usually the figure of greatest significance to the public, dropped from an already sound 4.3% in 1976, to an even better annual average of 3.6% for 1977.

Comparing the levels of the civilian labor force for the same two years, improvement is again very evident. From a previous year's average of 13,796, the number of persons in the labor pool increased to 1977's average of 14,522. At the same time, employment increased from 13,209 to 13,992, and the jobless rolls declined by an average

of fifty persons, to 530. During the past twelve months, employment reached its yearly high of 15,948, in August. Unemployment, on the other hand, reached its low point of 323 persons, in October.

Economic Highlights 1977:

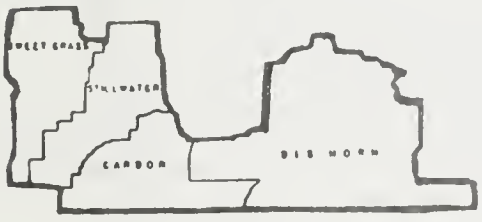
Examination of the economic events of 1977 reveals healthy progress overall for the region surrounding Glendive. The excellent year in the construction sector which Montana enjoyed as a whole, was also noticed in this LMA in the form of increased demand for housing and general business facilities. In each of these areas, contracting firms were kept busy until poor weather halted much of their work in late October and November. Highway construction was also an important factor, with a great deal of road improvement taking place in this eastern part of Montana.

Perhaps the greatest single factor which influenced the area during the year was the harvest and processing of the sugar beet crop. From September through December, various forms of work on this very important crop provided employment and economic stimulus to the region, particularly in the locations where shipping and processing were concentrated.

Two other aspects of commercial activity which showed distinct signs of improvement were the number of new businesses formed, and the total amount of bank debits recorded. In the former category, an increase of 48% over the 1976 total registration was realized, with 163 new firms operating in 1977, compared with 110 in the previous year. The most notable increase took place in Richland county where the number of new businesses almost doubled the 1976 total of 41.

Finally, in the latter category of bank debits (a rough indicator of consumer spending), the increases over previous year levels suggest healthy monetary infusions to the LMA economy, and thus provide another positive factor for this region.

HARDIN-RED LODGE LMA



Employment and Unemployment Situation:

The 1977 unemployment rate averaged 5.4% for the four counties comprising the Hardin-Red Lodge labor market area. This compares favorably with the areawide rate of 6.7% for 1976. The jobless rolls reflected this positive trend, as an average of 100 fewer persons were without jobs during the year. Out of 12,200 persons in the civilian labor pool, an average of 700 were unemployed for 1977.

In terms of employment, the monthly average for 1977 was 11,600 persons, which is a respectable 8.2% increase over the previous year's coverage. In other words, an additional 1,000 persons were added to the payrolls of the four counties during the year. This is important, as job creation and expansion point to positive economic growth in other areas of the overall local economy.

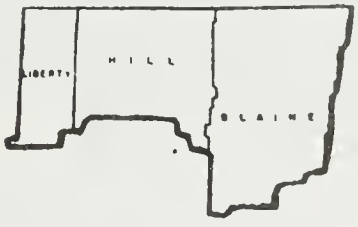
Among the individual areas, Big Horn county noted the smallest drop in unemployment, with the 1977 rate hitting 7.4% compared with 7.6% for 1976. Carbon, Stillwater and Sweet Grass counties noted rates of 5.1%, 3.8% and 2.8%, respectively. The comparable rates for 1976 were considerably higher - 6.8%, 6.2%, and 4.6%.

Economic Highlights 1977:

As with most of the state, the two primary economic indicators for this area presented conflicting pictures for 1977. New business formations, a good indicator of general economic expansion noted a positive year, although not by a large measure. The 1977 total reached 102, up 13 from the previous year's figure of 90. New car registrations, on the other hand showed a negative trend, as 1977's total fell 124 from 1976 levels - 436 new cars registered for 1977. When analyzing the two indicators, we must consider an obvious limitation: new car registrations indicate a sales downturn, but only among car dealers, while new business formations point to a general expansion of area businesses. With this in mind, along with an improved labor market during 1977, the four-county area appears to have followed state and national trends in enjoying an improved economy in comparison with 1975 and 1976.

Agriculture remains as an important industry to this labor area, both in terms of employment and cash flow. As was mentioned earlier, this sector did not enjoy many of the benefits of economic recovery, as did the nonagricultural sector. However, livestock prices did bounce upward slightly during the year, which helped neutralize the price slide in the harvest sector.

HAVRE LMA



Employment and Unemployment Situation:

The civilian labor force boasted an average of 13,300 persons in the Havre labor market area during 1977. This represents a healthy 7.6% increase over the 12,300 figure for 1976. The employment picture showed an even larger gain - 8.9%, to an annual average of 12,600 workers during 1977. In terms of sheer numbers, Hill county noted the largest employment gain, increasing 700 to an employed work force of 8,600 workers, while Blaine county experienced the largest percentage gain, 11.5%.

The unemployment situation also showed improvement over the previous year, as the jobless rolls fell 100 from 1976 levels and the jobless rate moved from 6% to 4.8%. This appears even more positive, when compared with rates of 6.1% and 7.1% for the state and the nation. The rates for the individual counties varied from 2.9% for Liberty County to 5.7% for Blaine County, with Hill County posting the areawide average rate of 4.8%.

The above statistics speak for themselves. The 1977 calendar year could be mentioned as sound in terms of employment growth and an across-the-board decline in joblessness.

Economic Highlights 1977:

New business formations remains as one of the leading gauges of economic activity within the county and labor market area level. As with most areas in the state, this indicator showed positive trends for the Havre labor area. The 1977 total reached 157, up nearly 24% from 1976's total, 127 new businesses. Specifically, the retail trade industry captured most of the spotlight for 1977. Late in the year construction began on a new $8 million shopping complex in Havre. The center is located on a 25 acre site on the west end of the city, and will enclose 223,000 square feet of space for the expected 41 stores, including three department stores and a theatre. As reported in an earlier issue, the boost to the economy should be two-fold - providing about 600 jobs at the complex and additional cash receipts of an expected 35 - 50% of the area's present gross retail cash receipts.

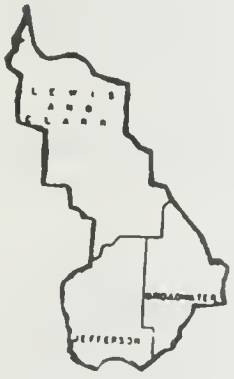
HAVRE LMA (Cont.)

Furthermore, in the city's downtown area, financing was arranged to convert a vacated building into a 71,761 square feet enclosed downtown shopping mall with leaseable space for up to 40 enterprises.

The major economic benefits of these two projects will not be felt until late 1978, when most of the stores are expected to be open for business. In a labor area primarily dependent on agriculture, and oil and gas exploration, the addition of two major retail complexes could add a new facet to the industrial composition of the area, particularly in Havre. Speculators have long felt that the highline region could use another shopping city and this potential is now becoming a reality.

Agricultural producers did not fare so well during 1977. Prices for wheat, barley and oats were below profitable levels for over two years, as was widely publicized through a nationwide farmers strike. And in an area boasting three of the top agricultural counties in the state, this price drop has had adverse effects. With lower cash receipts the tax base has suffered, as well as "Main Street" merchandising, particularly farm equipment dealers and related businesses.

HELENA LMA



Employment and Unemployment Situation:

The overall situation in employment and unemployment in the Helena labor area was favorable for 1977. For the year, the civilian labor force averaged 25,823, after a low level of 23,772 in January, and a year's high of 27,291 reached in August. This labor force average is 1,713 greater than that achieved in 1976, yielding an increase of 7.1%.

The number of persons employed also reached its lowest and highest levels in January and August, and averaged 24,430 for the year. This amounted to a very healthy increase of 8.4% from 1976 employment levels in the area.

Unemployment also showed positive movement on a year-to-year basis, with a decline from 1,578 persons in 1976, to an average of 1,393 for the past twelve months. These changes had a consequent positive effect on the average unemployment rate for the year. That widely observed gauge decreased from 6.5% in 1976, to 5.4% in 1977, indicating an improved employment atmosphere in the Helena labor market area.

Economic Highlights 1977:

The most significant aspect of the area economy during 1977 was likely the construction sector of industry. Cumulative valuation of building permits from January to October 1977 was slightly lower than for the same period in 1976; however, this comparison is somewhat misleading. Largely due to the mild winter in 1976-1977, building continued at a strong pace throughout the normally slow months, and continued until a peak was reached in July. After this point, construction began to decline at a time when it is normally most active. It is likely that the housing market was saturated and demand began to dwindle sooner than it usually would, thus accounting for the slight decrease in permits issued in the July through December period of 1977.

HELENA LMA (Cont.)

Other indicators of the economic health of the labor area were also generally positive for the year. As a partial measure of consumer spending, bank debits showed fairly consistent increases over 1976 totals, thus indicating some additional stimulus to the region in 1977.

The registration of new business firms was also a bright spot for the year. The cumulative total for the past twelve months was 381, a 64% increase from the previous year's high of 233. This change is indicative of improved commercial activity in the tri-county LMA, particularly in the greater Helena area.

Finally, one isolated event should be noted in a recapitulation of the 1977 economy in the Helena LMA. The National High School Rodeo Championships held during August, spurred local business activity and should not be underrated. The trade and service sectors of industry, in particular, were riding high during the month, having tremendous increases in sales and general business volume, which in many cases were greater than any previous period.

KALISPELL LMA

Employment and Unemployment Situation:

During 1977, the unemployment rate averaged 9.6% for the three counties comprising the Kalispell labor market area. An average of 3,100 workers were on the jobless rolls during the year, which is quite a drop from 1976 levels, when over 4,000 persons were out of work - 12.2% of the civilian labor force. Over 40% of the unemployed, 1,800 persons, resided in Flathead County, though Lincoln County experienced the highest rate of unemployment, at 13%. This was followed by Flathead County with 9.2% rate and Lake County with 7.4%.

The civilian labor force averaged 32,700 persons during 1977, which is an actual decline of 400 from the 1976 figure, 33, 100. However, the number of employed workers increased 400 from 1976 to an average of 29,500 for 1977. This situation occurred because the decline in unemployment more than offset the employment growth, which indicates an exodus of persons from the local labor force. Many workers simply drop out of the labor market, due to the frustration over the lack of job opportunities. Others relocate to areas where jobs are more plentiful.

The Kalispell area has been continuously plagued by unemployment problems throughout this decade. During recessions, as in 1970 - 1971 and 1974 - 1975, the situation further worsened, pushing the unemployment rate to double-digit levels. It follows that any recovery phase of the economy must be judged on the basis of pre-existing, historical unemployment problems. As the Kalispell economy exited the recent recession in 1976, the unemployment rate averaged 12.2%, and with further recovery in 1977 the rate dropped to 9.6%. In light of the fact that in 1975 13.4% of the three-county area's labor force was out of work, improvement has been achieved. This is not to say, however, that the economy of the region is completely remedied. This area still suffers from a serious over-supply of labor, and at 9.6%, the 1977 unemployment rate is still much higher than the state as a whole, as well as the nation.

Economic Highlights 1977:

The lumber and wood products industry remains the solid core of the Kalispell labor market area. Economic analyses have shown that, although this industry directly employs about

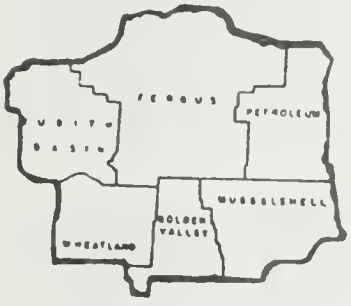
KALISPELL LMA (Cont.)

10% of western Montana's workers, indirectly it provides employment for about one-half of the area's work force. Because the wood products industry is heavily dependent on housing activity and more directly on the availability of money for home construction, downturns in this industry are more frequent than in the economy in general. As such, two consecutive good years can only be viewed with excitement. Spurred by new record residential building starts nationwide, lumber and related products sales have been at respectable levels over the past two years. In fact, driven by shortages of lumber in most parts of the country, the prices received for lumber escalated throughout 1977. However, the increases were not solely due to heavy demand; much of the increase was due to higher stumpage prices and cutbacks in available timberlands by the National Forest Service. By 1978, Montana's lumber industry may be even further affected, if it is determined that there is need for additional recreational preservational lands.

In conclusion, Kalispell area lumber mills and loggers did experience a good economic year during 1977, but there is worry over 1978 and possible cutbacks in timber lands, as well as a possible shortfall in housing demand.

The construction industry also fared relatively well during the past year, with peak demand for single family and apartment buildings. For example, permits were issued for over 40 new homes in the city of Kalispell alone. Also, 23 duplexes, triplexes and fourplexes were constructed in the city. The largest residential projects included: a $1.19 million, 61-unit apartment and a $774,000, 57-unit facility, both in Kalispell; a 24-unit complex in Libby at an expected cost of $366,000; and a 48-unit apartment complex for the elderly in Lake County.

LEWISTOWN LMA



Employment and Unemployment Situation:

The employment situation in the Lewistown labor area showed slight improvement over 1976, with positive movement in all figures which reflect the general labor market conditions. The civilian labor force averaged 10,863 during the year, compared with 10,627 persons in 1976. This amounted to an increase of 2.2%, somewhat less than the increases recorded in many other state areas.

Average employment increased 2.9%, to 1977's level of 10,294 people. Once again, improvement was noted, but not to a great degree. Perhaps more significant was the fact that the yearly average of the number of unemployed workers was 8.8% less than it was in 1976. This reduction is a very healthy one for the area, and it helped reduce the overall rate of unemployment from a 1976 plateau of 5.9%, to the 1977 level of 5.2%.

Economic Highlights 1977:

For the most part, this labor area has shown much the same economic trends from 1976 to 1977 as most other LMA's in Montana.

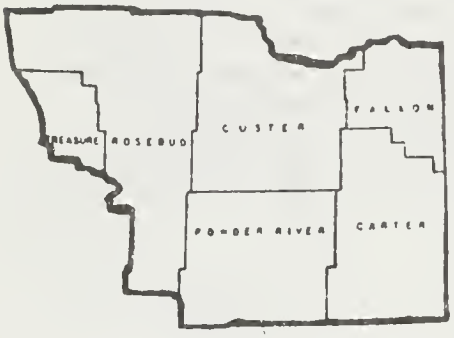
Although the six-county area is predominantly rural (even more so than many other parts of the state), it nonetheless experienced a 45% increase over the 1976 total of newly opened business firms. Most of the firms opened in Fergus County, and only Petroleum and Golden Valley Counties registered fewer new firms than in 1976.

LEWISTOWN LMA (Cont.)

For the LMA as a whole, the monthly trend in bank debits was increasing beyond previous year levels as well. Such a trend suggests some increase in consumer spending in the local economy and is a sustaining economic factor.

The project to improve the facilities at missile sites in the area launched a great deal of economic planning during 1977. With a sizeable influx of workers expected in the vicinity, construction of housing facilities to accommodate the increase in population was begun, amon other things. However, a labor dispute involving workers for the contracting company delayed progress and had an adverse, albeit temporary, effect on the area. With resolution of the conflict late in the year, derivative economic benefits should show up more prominently during 1978.

MILES CITY LMA



Employment and Unemployment Situation

During 1977 the civilian labor force in the Miles City LMA saw some moderate expansion (2.5%). Employment in the area made notable improvement over the previous year, but the significant activity occurred on the unemployment side, which decreased at a proportionately faster rate. The net effect on the ratio of unemployment was a decrease of .7 percentage points from the 1976 average rate of 5.2%.

Rosebud County posted the largest decrease in the unemployment rate. Here the rate dropped to 5.9% in 1977 from the 7.4% in 1976. In the rest of the labor market area the unemployment situation was virtually unchanged. In Custer County unemployment edged upward to an average of 255 in 1977 from 254 in 1976, and in Powder River County the averages were identical (unemployment of 36 for both 1976 and 1977).

Economic Highlights 1977:

Economic activity in the area was expected to be greatly influenced by activities in the Colstrip area during 1977. It was, but the on again/off again construction of energy projects left the economy uncertain as to the final disposition of the program. So, as was the case throughout the past two decades, highway construction highlighted the employment picture for most of the year. The initiation of four major road projects in the area provided a primary stimulus for the economy in terms of outside dollars, and also paved the way for some additional job opportunities for local unemployed. Again in 1977 building construction contributed to the overall health of the economy. In Miles City the groundwork was laid for a large shopping mall, and approval was also received for the expansion of the local community college. In addition, new home construction maintained its record 1976 pace, providing stable employment for local builders.

On the surface, the Miles City LMA appeared to be enjoying the benefits of an improving economy during 1977. This is somewhat true, but underlying these recent advancements remains the uncertainty in the agricultural sector. The economy of this area has diversified over the past decade, yet ranching and farming continue to be the mainstay of the region. Without some prospect of increases in agricultural cash receipts this coming year, the momentum furnished by other business sectors will be difficult to maintain.

MISSOULA LMA

Employment and Unemployment Situation:

The employment and unemployment situation in the Missoula labor area changed for the better during 1977. Comparing the year's employment averages with those of 1976 clearly indicates that more people were at work, and fewer were without work during the most recent twelve months. Examining the specific averages, the civilian labor force grew by 2,747, to a yearly level of 46,060. This represents a healthy 6.3% increase.

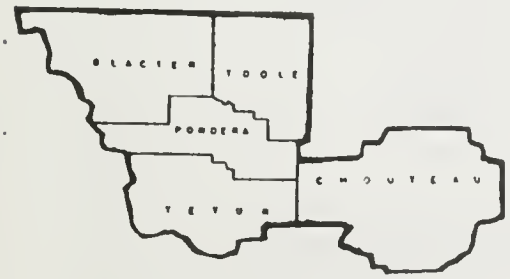
Employment for 1977 averaged 42,518, up by 3,325 persons. Conversely, unemployment declined by an average of 578, yielding a yearly level of 3,542 potential workers. These shifts in employment figures brought about a consequent drop in the unemployment rate from 9.5% in 1976, to 7.7% in 1977. Though the rate remains relatively high, the improvement is obvious.

Economic Highlights 1977:

The most prominent single factor influencing the general economic and employment situation in this part of Montana is the lumber and wood products industry. During 1977 the area's lumber mill chain saw a number of inconsistencies in work levels take place, with temporary layoffs occurring in many operations. Among other things, some of the reasons given for the variety of problems were securing and maintaining inventories (which in some cases were built up early in the year), drought conditions, and fluctuating timber prices. If the lumber sector was uncertain to some degree this year, the construction sector provided economic compensation in large part. The entire LMA, and particularly the City of Missoula, enjoyed one of its best building years, having high levels of activity through October. While many other parts of the state were experiencing some decline in construction, Missoula seemed to be continuing on a strong course. Among the many projects which were started during 1977, the one which stands out as the most economically significant is the $149 million expansion of production facilities at a major mill in the vicinity. With completion expected in 1981, the Missoula area should greatly benefit from the payroll and job increases which will accompany the undertaking.

Commerce, too, displayed clear signs of improvement over 1976. The number of new business firms in 1977 totaled 757, compared with 491 in the previous year. This amounts to an increase of 54%, one of the strongest advances registered in the state.

SHELBY-CUT BANK LMA



Employment and Unemployment Situation:

On an annual basis, an average of 1,000 persons were unemployed during 1977 in this five-county area. The unemployment rate lowered from 1976's level of 6.3% to 5.7% for 1976. Among the individual areas, the jobless rate ranged from a relatively high rate of 8.6% in Glacier County to a low of 3.2% for Chouteau County. The other areas experienced rates fairly close to the areawide average, with rates of measured unemployment at 5%, 4.7%, and 5.2% for Pondera, Teton, and Toole Counties, respectively.

SHELBY-CUT BANK LMA (Cont.)

An average of 17,600 persons participated in the civilian labor force during 1977, which represents a gain of 5.4% from the 16,700 figure for 1976. This marks a very good year in terms of labor expansion. Those holding employment averaged 16,600, up 900 workers from the previous year, or about 5.8%. All of the counties shared in the employment growth, except Teton County, which noted a small drop, although unchanged when rounded for reporting purposes. Overall, this five-county area experienced an improved labor market in comparison with 1976. The measured unemployment rates fell among all counties, and the LMA as a whole noted labor force growth.

Economic Highlights 1977:

During 1977, a total of 723 new cars were registered in the five-county Shelby labor market area. In comparison, 993 new cars were registered in this area during 1976, which in percentage terms, is a decline of 27%.

In contrast, new business formations ended 1977 in a positive light, with a total of 205 new firms, up nearly 18% from the 1976 total of 174 new businesses.

Of the major industrial groups, the agriculture and related industries, and manufacturing, suffered economic downturns during 1977. As is well know, wheat prices were at depressed levels throughout the year. This situation, coupled with a below normal crop yield, created a real money crunch among area farmers and ranchers. The manufacturing sector also received a jolt during 1977, as a small refinery in Toole County closed down in May. The plant was located in the town of Kevin and provided employment for about 40 persons. Toole County lost over $100,000 in tax revenue alone, because of the closure.

The construction and retail industries generally fared well during the year, with activity concentrated on the construction of new homes, retail outlets and a new 16-store shopping center in But Bank. The complex was still under construction at year's end, and, as such, major benefits to this industry will not be felt until 1978.

During the summer months, Toole and Glacier Counties received over $233,900 in federal funds for the summer employment of about 81 youths. The program was designed to help provide work experience for teenagers of low income families.

MANPOWER PROGRAM ACTIVITIES

December 1977

Program	New Enrollees	Job Placements	End of Month Enrollment
WIN	222	79	2157
CETA-CEP	72	40	256
CETA- CLASSROOM	74	22	402
CETA-OJT	36	49	167
JOB CORPS	18	33	380
PSE TITLE II	66	26	424
PSE TITLE VI	115	23	838
PSE TITLE VI "A"	66	11	480
CETA - AWE	52	9	125

CONSUMER PRICE INDEX - U. S.[1/]

(1967 = 100)

Group	Dec. 1977	*Percent Change From:* Nov. 1977	Dec. 1976
All Items	186.1	*.4%*	*6.8%*

CHARACTERISTICS OF THE UNEMPLOYED

December 1977

Social Characteristics	*Percent of Total Covered Unemployment*
Non-White	*3.7%*
Female	*21.5%*
Youth	*10.5%*
Over 45	*21.4%*

1/ The Consumer Price Index measures changes in prices of goods and services bought by urban wage earners and clerical workers, including families and single persons.

Table I

RESIDENCE DATA

MONTANA CIVILIAN LABOR FORCE

NOT SEASONALLY ADJUSTED
(in Thousands)

Date	Civilian Labor Force	EMPLOYMENT			UNEMPLOYMENT			Labor Management Dispute 2/
		Total	Non-Ag	Agri.	Total	Percent 1/ Montana	Percent 1/ U. S.	
1976								
January	316.8	284.0	263.1	20.9	32.8	*10.4*	*8.8*	*
February	317.8	287.0	263.9	23.1	30.8	*9.7*	*8.7*	*
March	325.7	295.1	267.0	28.1	30.6	*9.4*	*8.1*	*
April	333.4	307.8	272.8	35.0	25.6	*7.7*	*7.4*	*
May	336.4	314.0	277.7	36.3	22.4	*6.6*	*6.7*	*
June	353.9	325.2	283.5	41.7	28.7	*8.1*	*8.0*	.1
July	362.2	335.8	290.9	44.9	26.4	*7.3*	*7.8*	.1
August	364.9	339.7	291.3	48.4	25.2	*6.9*	*7.2*	.1
September	351.5	329.9	291.9	38.0	21.6	*6.2*	*7.4*	.1
October	340.6	319.7	287.2	32.5	20.9	*6.1*	*7.2*	.1
November	338.6	315.4	287.2	28.2	23.2	*6.9*	*7.4*	.1
December	335.8	311.1	286.7	24.4	24.7	*7.3*	*7.4*	.1
1976 Avg.	339.8	313.7	280.3	33.4	26.1	*7.7*	*7.7*	.1
1977								
January	324.5	296.9	274.3	22.6	27.6	*8.5*	*8.3*	.1
February	328.1	301.3	276.5	24.8	26.8	*8.2*	*8.5*	.1
March	336.3	310.8	280.9	29.9	25.5	*7.6*	*7.9*	.1
April	344.7	322.8	285.8	37.0	21.9	*6.3*	*6.9*	.1
May	349.0	329.7	291.5	38.2	19.3	*5.5*	*6.4*	.1
June	365.1	343.9	300.4	43.5	21.2	*5.8*	*7.5*	.2
July	373.6	353.0	306.5	46.5	20.6	*5.5*	*7.0*	3.3
August	380.9	361.0	311.2	49.8	19.9	*5.2*	*6.8*	.2
September	364.8	346.7	307.9	38.8	18.1	*5.0*	*6.6*	.1
October	354.9	337.1	304.1	33.0	17.8	*5.0*	*6.3*	.5
November	350.7	331.0	302.6	28.4	19.7	*5.6*	*6.4*	.1
December	348.6	328.3	303.9	24.4	20.3	*5.8*	*6.0*	.2
1977 Avg.	351.7	330.2	295.5	34.7	21.5	*6.1*		.4
1978								
January	*346.5*	*322.4*	*299.9*	*22.5*	*24.1*	*6.9*		*.2*
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Avg.								

1/ Computed from whole (unrounded) numbers. *Series began January 1970.*
2/ Non-additive - included in total employment. *Revised to 1977 Benchmarks.*
* *Under 50.* *Current month in italics is a forecast; previous month preliminary.*

RESIDENCE DATA

Table II

GREAT FALLS SMSA (CASCADE COUNTY)

Civilian Labor Force

NOT SEASONALLY ADJUSTED

(in Thousands)

Date	Civilian Labor Force	EMPLOYMENT			UNEMPLOYMENT			Labor Management Dispute 2/
		Total	Non-Ag	Agri.	Total	Percent 1/ County	Percent 1/ State	
1976								
January	30.5	27.4	26.6	.8	3.1	*10.3*	*10.4*	*
February	30.6	27.7	26.8	.9	2.9	*9.5*	*9.7*	*
March	31.8	28.8	27.7	1.1	3.0	*9.5*	*9.4*	*
April	32.2	29.7	28.3	1.4	2.5	*7.8*	*7.7*	*
May	32.7	30.4	29.0	1.4	2.3	*7.1*	*6.6*	*
June	34.3	31.1	29.5	1.6	3.2	*9.4*	*8.1*	*
July	33.9	31.0	29.2	1.8	2.9	*8.4*	*7.3*	*
August	34.0	31.4	29.5	1.9	2.6	*7.7*	*6.9*	*
September	33.0	30.9	29.4	1.5	2.1	*6.5*	*6.2*	*
October	33.0	30.8	29.5	1.3	2.2	*6.7*	*6.1*	*
November	33.1	30.8	29.7	1.1	2.3	*6.9*	*6.9*	*
December	31.0	28.8	27.8	1.0	2.2	*7.0*	*7.3*	*
1976 Avg.	32.5	29.9	28.6	1.3	2.6	*8.0*	*7.7*	*
1977								
January	32.2	29.6	28.7	.9	3.0	*8.0*	*8.5*	*
February	32.3	30.1	29.1	1.0	2.2	*6.8*	*8.2*	*
March	33.1	30.9	29.7	1.2	2.2	*6.7*	*7.6*	*
April	33.8	32.0	30.5	1.5	1.8	*5.4*	*6.3*	*
May	34.4	32.6	31.1	1.5	1.8	*5.2*	*5.5*	*
June	35.7	33.7	32.0	1.7	2.2	*5.6*	*5.8*	*
July	35.8	33.8	32.0	1.8	2.0	*5.6*	*5.5*	.8
August	35.8	33.8	31.8	2.0	2.0	*5.6*	*5.2*	*
September	35.6	33.6	32.1	1.5	2.0	*5.5*	*5.0*	*
October	35.6	33.6	32.3	1.3	2.0	*5.7*	*5.0*	.4
November	34.6	32.8	31.7	1.1	1.8	*5.3*	*5.6*	*
December	34.5	32.4	31.4	1.0	2.1	*6.0*	*5.8*	*
1977 Avg.	34.4	32.4	31.0	1.4	2.0	*5.9*	*6.1*	.1
1978								
January	*34.4*	*32.0*	*31.1*	*.9*	*2.4*	*7.1*	*6.9*	*
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Avg.								

1/ Computed from whole (unrounded) numbers. *Series began January 1970.*

2/ Non-additive - included in total employment. *Revised to 1977 Benchmarks.*

* *Under 50.* *Current month in italics is a forecast; previous month preliminary.*

Table III

BILLINGS SMSA (YELLOWSTONE COUNTY)

RESIDENCE DATA

Civilian Labor Force

NOT SEASONALLY ADJUSTED

(in Thousands)

Date	Civilian Labor Force	EMPLOYMENT			UNEMPLOYMENT			Labor Management Dispute 2/
		Total	Non-Ag	Agri.	Total	Percent 1/ County	Percent 1/ State	
1976								
January	45.8	42.1	41.1	1.0	3.7	*8.1*	*10.4*	*
February	45.8	42.5	41.4	1.1	3.3	*7.1*	*9.7*	*
March	46.7	43.3	42.0	1.3	3.4	*7.3*	*9.4*	*
April	49.2	46.3	44.7	1.6	2.9	*5.8*	*7.7*	*
May	48.8	46.5	44.8	1.7	2.3	*4.7*	*6.6*	*
June	51.2	47.7	45.8	1.9	3.5	*6.8*	*8.1*	*
July	51.0	47.9	45.8	2.1	3.1	*6.2*	*7.3*	*
August	50.6	47.7	45.5	2.2	2.9	*5.7*	*6.9*	*
September	51.3	48.8	47.1	1.7	2.5	*4.8*	*6.2*	*
October	50.4	48.0	46.5	1.5	2.4	*4.6*	*6.1*	*
November	50.5	48.0	46.7	1.3	2.5	*4.9*	*6.9*	*
December	50.6	47.8	46.7	1.1	2.8	*5.6*	*7.3*	*
1976 Avg.	49.3	46.4	44.9	1.5	2.9	*5.9*	*7.7*	*
1977								
January	49.3	46.1	45.1	1.0	3.2	*6.5*	*8.5*	*
February	49.7	46.7	45.6	1.1	3.0	*6.1*	*8.2*	*
March	50.5	47.8	46.4	1.4	2.7	*5.4*	*7.6*	*
April	51.2	48.9	47.2	1.7	2.3	*4.5*	*6.3*	*
May	51.7	49.5	47.7	1.8	2.2	*4.2*	*5.5*	*
June	52.3	50.1	48.1	2.0	2.2	*4.2*	*5.8*	*
July	53.0	50.8	48.7	2.1	2.2	*4.1*	*5.5*	.1
August	53.5	51.3	49.0	2.3	2.2	*4.0*	*5.2*	.1
September	54.0	51.9	50.1	1.8	2.1	*3.9*	*5.0*	.1
October	53.0	50.9	49.4	1.5	2.1	*4.0*	*5.0*	.1
November	52.7	50.6	49.3	1.3	2.1	*3.9*	*5.6*	.1
December	52.3	50.1	49.0	1.1	2.2	*4.2*	*5.8*	.1
1977 Avg.	52.0	49.6	48.0	1.6	2.4	*4.6*	*6.1*	*
1978								
January	*51.4*	*48.6*	*47.6*	*1.0*	*2.8*	*5.4*	*6.9*	*.1*
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Avg.								

1/ *Computed from whole (unrounded) numbers.* *Series began January 1970.*

2/ *Non-additive - included in total employment.* *Revised to 1977 Benchmarks.*

* *Under 50.* *Current month in italics is a forecast; previous month preliminary.*

RESIDENCE DATA
(ESTABLISHMENT DATA in italics)

Table IV

MONTANA

Statewide Employment by Industry

December 1977

in Thousands

INDUSTRY	Dec. 1977	Nov. 1977	Dec. 1976	Net Changes to Current Month from: Nov. 1977	Dec. 1976
CIVILIAN LABOR FORCE - PERSONS[1]	348.6	350.7	335.8	-2.1	12.8
EMPLOYED PERSONS	328.3	331.0	311.1	-2.7	17.2
Persons Employed in Agriculture	24.4	28.4	24.4	-4.0	0
UNEMPLOYED PERSONS	20.3	19.7	24.7	.6	-4.4
Percent of Labor Force, Unadjusted[2]	*5.8*	*5.6*	*7.3*	*.2*	*-1.5*
Percent of Labor Force, Seasonally Adjusted[2]	*5.5*	*5.7*	*7.0*	*-.2*	*-1.5*
NON-FARM WAGE AND SALARY JOBS (Establishment Data)	*271.6*	*271.2*	*257.0*	*.4*	*14.6*
MANUFACTURING	*24.0*	*24.3*	*24.2*	*-.3*	*-.2*
Durable Goods	*15.3*	*15.6*	*15.7*	*-.3*	*-.4*
24 Lumber and Wood Products	*9.1*	*9.2*	*9.4*	*-.1*	*-.3*
33 Primary Metal Industries	*3.3*	*3.3*	*3.3*	*0*	*0*
Other Durable Goods	*2.9*	*3.1*	*3.0*	*-.2*	*-.1*
Nondurable Goods	*8.7*	*8.7*	*8.5*	*0*	*.2*
20 Food and Kindred Products	*4.1*	*4.1*	*3.7*	*0*	*.4*
27 Printing and Publishing	*2.1*	*2.1*	*2.2*	*0*	*-.1*
29 Petroleum and Coal Products	*1.1*	*1.1*	*1.1*	*0*	*0*
Other Nondurable Goods	*1.4*	*1.4*	*1.5*	*0*	*-.1*
MINING	*6.5*	*6.3*	*6.3*	*.2*	*.2*
10 Metal Mining	*2.2*	*2.1*	*2.4*	*.1*	*-.2*
12 & 14 Bitum. Coal, Quarrying, Non-Metal Mining	*1.6*	*1.6*	*1.5*	*0*	*.1*
13 Oil and Gas Extraction	*2.7*	*2.6*	*2.4*	*.1*	*.3*

CONTRACT CONSTRUCTION	17.1	17.9	14.1	-.8	3.0
15 General Building Contractors	6.1	6.4	5.1	-.3	1.0
16 Heavy Construction Contractors	5.1	5.5	3.6	-.4	1.5
17 Special Trade Contractors	5.9	6.0	5.4	-.1	.5
TRANSPORTATION AND PUBLIC UTILITIES	20.5	20.4	20.2	.1	.3
40 Railroad Transportation	6.3	6.3	6.3	0	0
41-47 Transportation, except Railroad	6.2	6.2	6.5	0	-.3
48 & 49 Commun., Electric, Gas, Sanitary Services	8.0	7.9	7.4	.1	.6
WHOLESALE AND RETAIL TRADE	68.1	68.0	66.5	.1	1.6
Wholesale Trade	17.1	16.8	15.4	.3	1.7
Retail Trade	51.0	51.2	51.1	-.2	-.1
53 & 56 General Merchandise, Apparel, Accessories	8.5	8.5	8.6	0	-.1
54 Food Stores	7.3	7.1	6.4	.2	.9
55 Automotive Dealers, Service Stations	7.4	7.5	8.4	-.1	-1.0
58 Eating and Drinking Places	18.7	19.0	17.5	-.3	1.2
52, 57, 59 Bldg. Mat., Farm Equip., Furn., Misc.	9.1	9.1	10.2	0	-1.1
FINANCE, INSURANCE AND REAL ESTATE	12.0	12.0	11.1	0	.9
SERVICES	50.2	50.2	48.0	0	2.2
70 Hotels and other Lodging Places	6.9	7.0	5.7	-.1	1.2
72 Personal Services	2.6	2.6	2.5	0	.1
80 Medical and other Health Services	16.0	15.9	15.4	.1	.6
Other Services	24.7	24.7	24.4	0	.3
GOVERNMENT	73.2	72.1	66.6	1.1	6.6
91 Federal Government	14.2	14.0	13.1	.2	1.1
92 State Colleges and Universities	8.7	9.0	9.2	-.3	-.5
92 Other State Government	11.3	10.4	10.5	.9	.8
93 Local Education	25.0	25.0	21.8	0	3.2
93 Other Local Government	14.0	13.7	12.0	.3	2.0

1/ Estimates based on National Household Sample, Census and Other Relationships; includes self-employed, unpaid family, and domestic workers. Current month preliminary. Revised to 1977 Benchmarks.

2/ Computed from whole (unrounded) numbers.

Establisment Series began January 1964; Residence Series began January 1970.

RESIDENCE DATA
(ESTABLISHMENT DATA in italics)

Table V

GREAT FALLS SMSA (CASCADE COUNTY)

Employment by Industry

December 1977

in Thousands

INDUSTRY	Dec. 1977	Nov. 1977	Dec. 1976	Net Changes to Current Month from: Nov. 1977	Dec. 1976
CIVILIAN LABOR FORCE - PERSONS[1/]	34.5	34.6	31.0	-.1	3.5
EMPLOYED PERSONS	32.4	32.8	28.8	-.4	3.6
Persons Employed in Agriculture	1.0	1.1	1.0	-.1	0
UNEMPLOYED PERSONS	2.1	1.8	2.2	.3	-.1
Percent of Labor Force, Unadjusted[2/]	*6.0*	*5.3*	*7.0*	*.7*	*-1.0*
Percent of Labor Force, Seasonally Adjusted[2/]	*6.2*	*5.7*	*7.2*	*.5*	*-1.0*
NON-FARM WAGE AND SALARY JOBS (Establishment Data)	*30.0*	*30.3*	*28.3*	*-.3*	*1.7*
Manufacturing	*1.6*	*1.6*	*1.7*	*0*	*-.1*
Contract Construction	*1.8*	*2.1*	*1.9*	*-.3*	*-.1*
Transportation and Public Utilities	*1.7*	*1.7*	*1.8*	*0*	*-.1*
Trade	*10.2*	*10.2*	*9.1*	*0*	*1.1*
Wholesale Trade	*2.9*	*2.8*	*2.6*	*.1*	*.3*
Retail Trade	*7.3*	*7.4*	*6.5*	*-.1*	*.8*
Finance, Insurance and Real Estate	*1.9*	*1.9*	*1.7*	*0*	*.2*
Services and Mining	*6.6*	*6.6*	*6.2*	*0*	*.4*
Government	*6.2*	*6.2*	*5.9*	*0*	*.3*
Federal Government	*2.1*	*2.1*	*2.0*	*0*	*.1*
State and Local Government	*4.1*	*4.1*	*3.9*	*0*	*.2*

1/ Estimates based on National Household Sample, Census and Other Relationships; includes self-employed, unpaid family, and domestic workers.

2/ Computed from whole (unrounded) numbers.

Current month preliminary.

Revised to 1977 Benchmarks.

Table VI

BILLINGS SMSA (YELLOWSTONE COUNTY)

Employment by Industry

December 1977

in Thousands

INDUSTRY	Dec. 1977	Nov. 1977	Dec. 1976	Net Changes to Current Month from: Nov. 1977	Dec. 1976
CIVILIAN LABOR FORCE - PERSONS[1]	52.3	52.7	50.6	-.4	1.7
EMPLOYED PERSONS	50.1	50.6	47.8	-.5	2.3
Persons Employed in Agriculture	1.1	1.3	1.1	-.2	0
UNEMPLOYED PERSONS	2.2	2.1	2.8	.1	-.6
Percent of Labor Force, Unadjusted[2]	*4.2*	*3.9*	*5.6*	*.3*	*-1.4*
Percent of Labor Force, Seasonally Adjusted[2]	*4.1*	*4.5*	*5.6*	*-.4*	*-1.5*
NON-FARM WAGE AND SALARY JOBS (Establishment Data)	*44.4*	*44.7*	*41.9*	*-.3*	*2.5*
Manufacturing	*3.7*	*3.7*	*3.1*	*0*	*.6*
Contract Construction	*2.9*	*3.3*	*2.5*	*-.4*	*.4*
Transportation and Public Utilities	*3.8*	*3.9*	*3.7*	*-.1*	*.1*
Trade	*15.0*	*15.0*	*13.8*	*0*	*1.2*
Wholesale Trade	*5.6*	*5.5*	*4.5*	*.1*	*1.1*
Retail Trade	*9.4*	*9.5*	*9.3*	*-.1*	*.1*
Finance, Insurance and Real Estate	*2.1*	*2.1*	*2.0*	*0*	*.1*
Services and Mining	*8.4*	*8.4*	*8.3*	*0*	*.1*
Government	*8.5*	*8.3*	*8.5*	*.2*	*0*
Federal Government	*1.6*	*1.6*	*1.8*	*0*	*-.2*
State and Local Government	*6.9*	*6.7*	*6.7*	*.2*	*.2*

1/ Estimates based on National Household Sample, Census and Other Relationships; includes self-employed, unpaid family, and domestic workers.

2/ Computed from whole (unrounded) numbers.

Current month preliminary. *Revised to 1977 Benchmarks.*

Table VII

MONTANA LABOR MARKET AREAS[1/]

Civilian Labor Force

in Thousands

	CIVILIAN LABOR FORCE			EMPLOYMENT			UNEMPLOYMENT			UNEMPLOYMENT RATE		
	Oct. 1977	Nov. 1977	Dec. 1977	Oct. 1977	Nov. 1977	Dec. 1977	Oct. 1977	Nov. 1977	Dec. 1977	Oct. 1977	Nov. 1977	Dec. 1977
STATEWIDE	354.9	350.7	348.6	337.1	331.0	328.3	17.8	19.7	20.3	*5.0*	*5.6*	*5.8*
GREAT FALLS SMSA	35.6	34.6	34.5	33.6	32.8	32.4	2.0	1.8	2.1	*5.7*	*5.3*	*6.0*
BILLINGS SMSA	53.0	52.7	52.3	50.9	50.6	50.1	2.1	2.1	2.2	*4.0*	*3.9*	*4.2*
BALANCE OF STATE[2/]	266.3	363.4	261.8	252.6	247.6	245.8	13.7	15.8	16.0	*5.1*	*6.0*	*6.1*
ANACONDA-BUTTE	34.7	33.9	33.9	32.6	31.6	31.5	2.1	2.3	2.4	*6.0*	*6.7*	*7.0*
BOZEMAN	25.2	24.6	24.9	24.2	23.4	23.7	1.0	1.2	1.2	*3.8*	*5.0*	*4.7*
GLASGOW	17.2	16.7	16.7	16.5	15.8	15.9	.7	.9	.8	*4.2*	*5.3*	*5.1*
GLENDIVE	15.1	14.6	14.0	14.8	14.2	13.6	.3	.4	.4	*2.1*	*2.9*	*3.1*
HARDIN-RED LODGE	12.0	11.6	11.5	11.5	11.0	10.8	.5	.6	.7	*4.6*	*5.4*	*5.7*
HAVRE	13.5	13.3	13.1	13.0	12.8	12.5	.5	.5	.6	*3.4*	*3.5*	*4.6*
HELENA	26.5	26.0	26.2	25.3	24.6	24.8	1.2	1.4	1.4	*4.5*	*5.3*	*5.3*
KALISPELL	33.1	32.5	32.6	30.5	29.8	29.7	2.6	2.7	2.9	*7.8*	*8.3*	*8.9*
LEWISTOWN	11.2	10.4	10.3	10.8	10.0	9.7	.4	.4	.6	*3.8*	*4.1*	*6.1*
MILES CITY	15.6	15.2	14.6	15.1	14.5	13.9	.5	.7	.7	*3.4*	*4.5*	*5.0*
MISSOULA	47.7	47.2	47.2	44.7	44.1	43.8	3.0	3.1	3.4	*6.2*	*6.5*	*7.2*
SHELBY-CUT BANK	17.8	16.9	16.7	16.9	15.9	15.8	.9	1.0	.9	*5.0*	*5.8*	*5.5*

1/ A list of counties included in each Labor Market Area appears on "New Business Firms" page. Map inside back cover.
2/ Statewide, excluding Great Falls and Billings Standard Metropolitan Statistical Areas.

TABLE VIII

MONTANA LABOR MARKET AREAS[1/]

Civilian Labor Force

in Thousands

	CIVILIAN LABOR FORCE			EMPLOYMENT			UNEMPLOYMENT			UNEMPLOYMENT RATE		
	Dec. 1977	Dec. 1976	Percent Change 1976-1977	Dec. 1977	Dec. 1976	Percent Change 1976-1977	Dec. 1977	Dec. 1976	Net Change 1976-1977	Dec. 1977	Dec. 1976	Net Change 1976-1977
STATEWIDE	348.6	335.8	*3.8*	328.3	311.1	*5.5*	20.3	24.7	-4.4	*5.8*	*7.3*	*-1.5*
GREAT FALLS SMSA	34.5	31.0	*11.3*	32.4	28.8	*12.5*	2.1	2.2	-.1	*6.0*	*7.0*	*-1.0*
BILLINGS SMSA	52.3	50.6	*3.4*	50.1	47.8	*4.8*	2.2	2.8	-.6	*4.2*	*5.6*	*-1.4*
BALANCE OF STATE[2/]	261.8	254.2	*3.0*	245.8	234.5	*4.8*	16.0	19.7	-3.7	*6.1*	*7.7*	*-1.6*
ANACONDA-BUTTE	33.9	33.6	*.9*	31.5	30.5	*3.3*	2.4	3.1	-.7	*7.0*	*9.1*	*-2.1*
BOZEMAN	24.9	24.6	*1.2*	23.7	23.1	*2.6*	1.2	1.5	-.3	*4.7*	*6.2*	*-1.5*
GLASGOW	16.7	15.9	*5.0*	15.9	14.8	*7.4*	.8	1.1	-.3	*5.1*	*6.7*	*-1.6*
GLENDIVE	14.0	12.9	*8.5*	13.6	12.2	*11.5*	.4	.7	-.3	*3.1*	*5.8*	*-2.7*
HARDIN-RED LODGE	11.5	10.6	*8.5*	10.8	9.9	*9.1*	.7	.7	0	*5.7*	*6.4*	*-.7*
HAVRE	13.1	11.3	*15.9*	12.5	10.6	*17.9*	.6	.7	-.1	*4.6*	*6.3*	*-1.7*
HELENA	26.2	23.5	*11.5*	24.8	22.1	*12.2*	1.4	1.4	0	*5.3*	*6.2*	*-.9*
KALISPELL	32.6	32.7	*-.3*	29.7	29.1	*2.1*	2.9	3.6	-.7	*8.9*	*10.9*	*-2.0*
LEWISTOWN	10.3	10.0	*3.0*	9.7	9.2	*5.4*	.6	.8	-.2	*6.1*	*7.7*	*-1.6*
MILES CITY	14.6	13.5	*8.1*	13.9	12.6	*10.3*	.7	.9	-.2	*5.0*	*6.9*	*-1.9*
MISSOULA	47.2	42.9	*10.0*	43.8	38.9	*12.6*	3.4	4.0	-.6	*7.2*	*9.4*	*-2.2*
SHELBY-CUT BANK	16.7	15.7	*6.4*	15.8	14.6	*8.2*	.9	1.1	-.2	*5.5*	*6.9*	*-1.4*

1/ A list of counties included in each Labor Market Area appears on "New Business Firms" page. Map inside back cover.
2/ Statewide, excluding Great Falls and Billings Standard Metropolitan Statistical Areas.

TABLE IX

MONTANA MONTHLY LABOR FORCE, BY COUNTY
DECEMBER 1977

COUNTY	CIVILIAN LABOR FORCE	EMPLOYMENT	UNEMPLOYMENT	PERCENT RATE
STATEWIDE	346590	326275	20315	5.9
CASCADE	34442	32364	2078	6.0
YELLOWSTONE	52346	50151	2195	4.2
BEAVERHEAD	4301	4124	177	4.1
BIG HORN	4452	4150	302	6.8
BLAINE	2901	2724	177	6.1
BROADWATER	1416	1323	93	6.6
CARBON	3252	3054	198	6.1
CARTER	651	604	47	5.5
CHOTEAU	2906	2810	96	3.3
CUSTER	5700	5390	310	5.4
DANIELS	1373	1324	49	3.6
DAWSON	5263	5100	163	3.1
DEER LODGE	6374	5919	455	7.1
FALLON	2125	2062	63	3.0
FERGUS	5430	5131	299	5.5
FLATHEAD	19498	17848	1650	8.5
GALLATIN	18827	18118	709	3.8
GARFIELD	796	777	19	2.4
GLACIER	5005	4610	395	7.9
GOLDEN VALLEY	425	390	35	8.2
GRANITE	960	874	86	8.8
HILL	9124	8751	373	4.1
JEFFERSON	2628	2403	225	8.6
JUDITH BASIN	1173	1071	102	8.7
LAKE	6368	5915	453	7.1
LEWIS AND CLARK	22121	21043	1078	4.9
LIBERTY	1049	996	53	5.1
LINCOLN	6771	5982	789	11.7
MC CONE	1377	1329	48	3.5
MADISON	2357	2194	163	6.9
MEAGHER	805	749	56	7.0
MINERAL	1547	1356	191	12.3
MISSOULA	34661	32485	2176	6.3
MUSSELSHELL	1670	1575	95	5.7
PARK	5225	4826	399	7.6
PETROLEUM	318	309	9	2.8
PHILLIPS	2441	2329	112	4.6
PONDERA	3497	3331	166	4.7
POWDER RIVER	976	944	32	3.3
POWELL	3112	2903	209	6.7
PRAIRIE	970	935	35	3.6
RAVALLI	6522	5832	690	10.6
RICHLAND	5061	4911	150	3.0
ROOSEVELT	5711	5481	230	4.0
ROSEBUD	4516	4268	248	5.5
SANDERS	4517	4177	340	7.5
SHERIDAN	2395	2322	71	3.0
SILVER BOW	16809	15511	1298	7.7
STILLWATER	2347	2240	107	4.6
SWEET GRASS	1400	1359	41	2.9
TETON	2455	2336	119	4.8
TOOLE	2855	2713	142	5.0
TREASURE	449	422	27	6.0
VALLEY	4823	4434	389	8.1
WHEATLAND	1315	1228	87	6.6
WIBAUX	562	546	16	2.8

TABLE X

MONTANA

FEMALE EMPLOYMENT BY INDUSTRY

December 1977

(In Thousands)

INDUSTRY	FEMALE EMPLOYMENT					TOTAL EMPLOYMENT COMPARISON			
	Dec. 1977 1/	Nov. 1977	Dec. 1976	Net Change to Current Month From: Nov. 1977	Net Change to Current Month From: Dec. 1976	Total	Percent Women	Total	Percent Women
						December 1977		November 1977	
Nonagricultural Wage & Salary Workers	115.2	114.6	104.1	.6	11.1	271.6	*42.4*	271.2	*42.3*
Manufacturing	2.8	2.9	3.1	-.1	-.3	24.0	*11.4*	24.3	*12.1*
Mining	.3	.3	.3	0	0	6.5	*4.9*	6.3	*5.0*
Contract Construction	1.1	1.1	.8	0	.3	17.1	*6.2*	17.9	*6.4*
Transportation & Public Utilities	3.8	3.8	3.5	0	.3	20.5	*18.5*	20.4	*18.4*
Wholesale & Retail Trade	31.4	31.4	27.7	0	3.7	68.1	*46.2*	68.0	*46.1*
Finance, Insurance & Real Estate	7.6	7.6	6.8	0	.8	12.0	*63.6*	12.0	*63.8*
Services	33.1	33.1	30.1	0	3.0	50.2	*66.0*	50.2	*65.9*
Government 2/	35.1	34.4	31.8	.7	3.3	73.2	*48.0*	72.1	*47.8*

1/ *Current month preliminary. Revised to 1976 Benchmark. Establishment Series began January 1974.*

2/ *Includes all civilian employees of Federal, State, and Local Governments regardless of the activity in which the employee is engaged.*

Prepared by the Montana Employment Security Division in Cooperation with the U. S. Department of Labor, Bureau of Labor Statistics.

TABLE XI

MONTANA FEMALE EMPLOYMENT BY INDUSTRY

(In Thousands)

1976

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Ann. Avg.
Nonagricultural Wage & Salary .	95.3	95.3	96.4	98.5	100.1	101.3	102.1	103.0	103.6	103.6	104.1	104.1	100.7
Manufacturing	2.6	2.6	2.5	2.6	2.7	3.0	3.1	3.3	3.3	3.3	3.2	3.1	3.0
Mining	.3	.3	1.3	.3	.3	.3	.3	.3	.3	.3	.3	.3	.3
Contract Construction	.8	.8	.8	1.0	1.0	1.0	1.1	1.1	1.1	1.0	1.0	.8	1.0
Transport. & Public Utilities	3.6	3.5	3.5	3.5	3.6	3.6	3.6	3.7	3.6	3.5	3.5	3.5	3.6
Wholesale & Retail Trade	23.5	23.2	24.0	25.4	26.4	27.1	28.4	28.3	28.5	27.4	27.5	27.7	26.4
Finance, Ins., & Real Estate .	6.5	6.5	6.6	6.6	6.6	6.7	6.8	7.0	7.0	6.9	6.8	6.8	6.7
Services	27.7	27.9	28.1	28.5	28.7	29.6	30.0	30.5	30.4	30.1	30.2	30.1	29.3
Government1/	30.3	30.5	30.6	30.6	30.8	30.3	29.1	28.8	29.4	31.1	31.6	31.8	30.4

1977

Nonagricultural Wage & Salary .	103.2	103.8	105.8	107.0	105.9	109.8	109.2	111.7	114.2	113.9	114.6	115.2
Manufacturing	3.2	3.1	3.0	3.1	2.9	3.0	3.0	3.1	3.0	3.2	2.9	2.8
Mining	.3	.3	.3	.3	.3	.3	.3	.3	.3	.3	.3	.3
Contract Construction	.8	.8	.7	.8	1.0	1.0	1.1	1.3	1.3	1.1	1.1	1.1
Transport. & Public Utilities	3.5	3.5	3.5	3.4	3.6	3.8	3.9	3.8	3.7	3.8	3.8	3.8
Wholesale & Retail Trade	26.8	26.7	28.0	28.8	29.0	30.6	30.2	30.2	30.6	31.1	31.4	31.4
Finance, Ins., & Real Estate .	6.8	6.9	6.9	6.9	7.0	7.1	7.2	7.5	7.6	7.6	7.6	7.6
Services	30.5	30.7	31.1	31.4	31.3	32.4	32.6	32.6	33.1	32.4	33.1	33.1
Government1/	31.3	31.8	32.3	32.3	30.8	31.6	30.9	32.9	34.6	34.4	34.4	35.1

1/ Includes all civilian employees of Federal, State, and Local Governments regardless of the activity in which the employee is engaged. Establishment Series began January, 1974. Revised to 1976 Benchmark.
Prepared by Montana Employment Security Division in cooperation with U. S. Dept. of Labor, Bureau of Labor Statistics.

ECONOMIC INDICATORS

COMPOSITE INDEX OF SIX ECONOMIC INDICATORS* 10 **

Composite Index of SIX ECONOMIC INDICATORS 1972 = 100

1976	
January	97.2
February	95.7
March	97.6
April	96.9
May	95.0
June	93.3
July	93.9
August	94.8
September	98.1
October	99.3
November	98.3
December	98.8
1977	
January	97.2
February	98.3
March	98.3
April	99.2
May	97.3
June	97.6
July	98.0
August	98.6
September	99.0
October	101.1
November	
December	

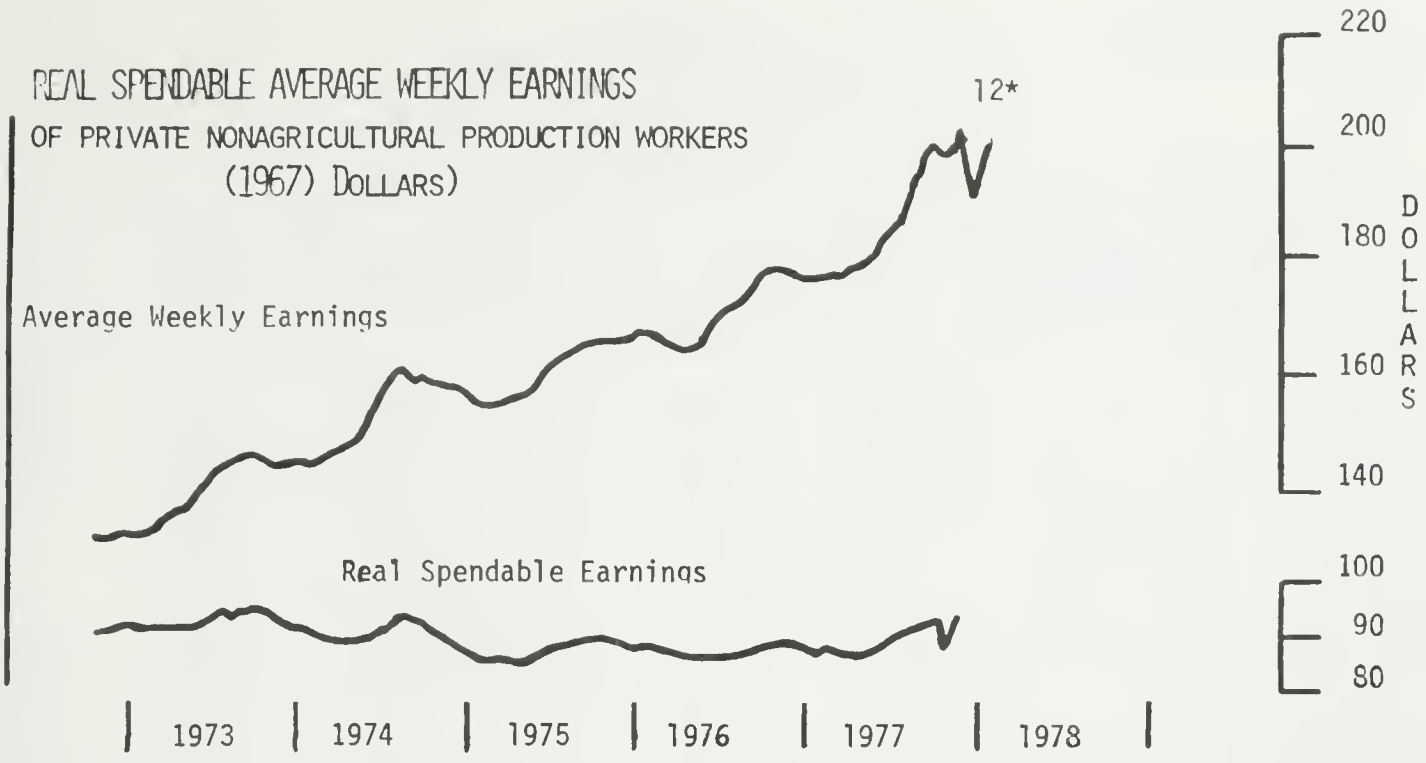
MONTANA'S COMPOSITE INDEX

Movement in Montana economic indicators for October displayed an increased positiveness in the economy. This, too, was reflected in the latest figures for Montana's Composite Index. Improvements in manufacturing employment and weekly initial claims data forced the index up to 101.1, the highest recording since 1973.

The projection for November seems to reverse the recent gains. Most components seem to be unchanged but average weekly claims for unemployment benefits jumped over 30% during the period.

* *Employment, Average Weekly Hours, Total Accessions, and Layoffs in Manufacturing; Building Permits, and Average Weekly Initial Unemployment Insurance Claims.*

** *Indicates last month of plotted data.*



	Dec. 1977	Nov. 1977	Dec. 1976
Gross Average Weekly Earnings	$198.18	$190.85	$175.78
Taxes Withheld	29.31	27.25	26.58
Spendable Earnings	168.87	163.60	149.21
Adjustment for Price Changes Since 1967	78.14	75.37	63.59
Real Spendable Earnings in 1967 Dollars	90.73	88.23	85.62

	Average Weekly Earnings 1/	Real Spendable Earnings 2/
1976		
July	172.67	85.92
Aug.	175.69	86.77
Sep.	178.92	87.72
Oct.	177.79	86.90
Nov.	175.02	85.54
Dec.	175.78	85.62
1977		
Jan.	175.94	85.17
Feb.	176.00	84.35
Mar.	174.94	83.40
Apr.	178.69	84.21
May	184.79	86.12
June	185.26	87.77
July	190.97	89.63
Aug.	200.28	92.96
Sep.	197.89	91.67
Oct.	202.65	93.29
Nov.	190.85	88.23
Dec.	198.18p	90.73p

REAL SPENDABLE EARNINGS

During the past two months this index has behaved very erratically. This lack of consistency makes it difficult to predict anything more than the basic movement of the figures.

Some seasonal downturn was expected, but the huge drop in November could be treated as a statistical aberration. The rebound in December indicated that, despite the occasional irregular movements, the underlying trend remains on an improving line.

* *Indicates last month of plotted data.* *p: Preliminary*

1/ Average weekly earnings of total private nonagricultural production workers.

2/ Real spendable average weekly earnings of private nonagricultural production workers.

TABLE XII

RESIDENCE DATA

MONTANA CIVILIAN LABOR FORCE

SEASONALLY ADJUSTED

(in Thousands)

Date	Civilian Labor Force	EMPLOYMENT			UNEMPLOYMENT			Labor Management Dispute[2]
		Total	Non-Ag	Agri.	Total	Percent[1] Montana	Percent[1] U. S.	
1976								
January	335.4	308.3	275.8	32.5	27.1	8.1	7.8	*
February	336.6	310.1	276.7	33.4	26.5	7.9	7.6	*
March	336.0	308.9	275.9	33.0	27.1	8.1	7.5	*
April	337.2	311.9	276.8	35.1	25.3	7.5	7.5	*
May	335.5	309.9	276.8	33.1	25.6	7.6	7.3	*
June	332.0	305.7	272.6	33.1	26.3	7.9	7.5	.1
July	341.9	314.8	280.3	34.5	27.1	7.9	7.8	.1
August	344.1	315.2	281.5	33.7	28.9	8.4	7.9	.1
September	343.9	317.8	285.0	32.8	26.1	7.6	7.8	.1
October	343.0	318.2	285.2	33.0	24.8	7.2	7.9	.1
November	346.2	322.0	288.9	33.1	24.2	7.0	8.1	.1
December	345.5	321.3	287.6	33.7	24.2	7.0	7.8	.1
1976 Avg.	339.8	313.7	280.3	33.4	26.1	7.7	7.7	.1
1977								
January	343.2	321.3	287.1	34.2	21.9	6.4	7.3	.1
February	347.0	324.5	289.4	35.1	22.5	6.5	7.5	.1
March	346.7	324.7	289.8	34.9	22.0	6.4	7.3	.1
April	348.5	327.0	289.7	37.3	21.5	6.2	7.0	.1
May	348.2	325.7	290.8	34.9	22.5	6.5	6.9	.1
June	343.1	324.4	289.4	35.0	18.7	5.4	7.1	.2
July	353.2	331.9	295.7	36.2	21.3	6.0	6.9	3.3
August	360.3	336.7	301.5	35.2	23.6	6.6	7.1	.2
September	357.2	334.6	300.9	33.7	22.6	6.3	6.9	.1
October	357.2	335.5	302.1	33.4	21.7	6.1	7.0	.5
November	358.1	337.5	304.2	33.3	20.6	5.7	6.9	.1
December	358.1	338.3	304.6	33.7	19.8	5.5	6.4	.2
1977 Avg.	351.7	330.2	295.5	34.7	21.5	6.1		.4
1978								
January								
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Avg.								

1/ Computed from whole (unrounded) numbers.

2/ Non-additive - included in total employment

* *Under 50.*

Series began January 1970
Revised to 1977 Benchmarks.
Current month preliminary.

NOTE: Seasonally adjusted data are provided for statistical analysis only and should not be confused with actual numbers.

RESIDENCE DATA

TABLE XIII
GREAT FALLS SMSA (CASCADE COUNTY)
Civilian Labor Force
SEASONALLY ADJUSTED
(in Thousands)

Date	Civilian Labor Force	EMPLOYMENT			UNEMPLOYMENT			Labor Management Dispute[2/]
		Total	Non-Ag	Agri.	Total	Percent[1/] County	Percent[1/] State	
1976								
January	32.0	29.3	28.0	1.3	2.7	8.5	8.1	*
February	32.1	29.4	28.1	1.3	2.7	8.3	7.9	*
March	32.6	29.8	28.5	1.3	2.8	8.6	8.1	*
April	32.4	29.8	28.4	1.4	2.6	8.2	7.5	*
May	32.4	29.9	28.6	1.3	2.5	7.7	7.6	*
June	32.7	29.9	28.6	1.3	2.8	8.6	7.9	*
July	32.6	29.8	28.4	1.4	2.8	8.5	7.9	*
August	32.9	30.1	28.7	1.4	2.8	8.5	8.4	*
September	32.5	30.0	28.7	1.3	2.5	7.6	7.6	*
October	32.9	30.4	29.1	1.3	2.5	7.5	7.2	*
November	33.4	31.0	29.7	1.3	2.4	7.3	7.0	*
December	31.4	29.1	27.8	1.3	2.3	7.2	7.0	*
1976 Avg.	32.5	29.9	28.6	1.3	2.6	8.0	7.7	*
1977								
January	33.8	31.6	30.2	1.4	2.2	6.5	6.4	*
February	33.8	31.8	30.4	1.4	2.0	5.8	6.5	*
March	33.8	31.9	30.5	1.4	1.9	5.6	6.4	*
April	34.1	32.1	30.6	1.5	2.0	5.8	6.2	*
May	34.0	32.1	30.7	1.4	1.9	5.5	6.5	*
June	34.1	32.5	31.1	1.4	1.6	4.7	5.4	*
July	34.5	32.6	31.2	1.4	1.9	5.6	6.0	.8
August	34.7	32.6	31.2	1.4	2.1	6.2	6.6	*
September	35.1	32.8	31.5	1.3	2.3	6.5	6.3	*
October	35.5	33.2	31.9	1.3	2.3	6.5	6.1	.4
November	35.0	33.0	31.7	1.3	2.0	5.7	5.7	*
December	34.9	32.7	31.4	1.3	2.2	6.2	5.5	*
1977 Avg.	34.4	32.4	31.0	1.4	2.0	5.9	6.1	.1
1978								
January								
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Avg.								

1/ Computed from whole (unrounded) numbers.
2/ Non-additive - included in total employment.
* *Under 50.*

Series began January 1970.
Revised to 1977 Benchmarks.
Current month preliminary.

NOTE: Seasonally adjusted data are provided for statistical analysis only and should not be confused with actual numbers.

TABLE XIV

BILLINGS SMSA (YELLOWSTONE COUNTY)

Civilian Labor Force

SEASONALLY ADJUSTED

(in Thousands)

Date	Civilian Labor Force	EMPLOYMENT			UNEMPLOYMENT			Labor Management Dispute 2/
		Total	Non-Ag	Agri.	Total	Percent 1/ County	Percent 1/ State	
1976								
January	47.3	44.2	42.7	1.5	3.1	6.6	8.1	*
February	47.9	44.9	43.4	1.5	3.0	6.2	7.9	*
March	48.1	45.1	43.6	1.5	3.0	6.2	8.1	*
April	49.8	46.8	45.2	1.6	3.0	6.0	7.5	*
May	48.7	46.0	44.5	1.5	2.7	5.7	7.6	*
June	49.5	46.4	44.8	1.6	3.1	6.2	7.9	*
July	49.3	46.3	44.8	1.5	3.0	6.1	7.9	*
August	49.5	46.5	44.9	1.6	3.0	6.1	8.4	*
September	51.0	48.2	46.7	1.5	2.8	5.6	7.6	*
October	50.0	47.2	45.7	1.5	2.8	5.6	7.2	*
November	50.3	47.5	46.0	1.5	2.8	5.5	7.0	*
December	50.5	47.7	46.2	1.5	2.8	5.6	7.0	*
1976 Avg.	49.3	46.4	44.9	1.5	2.9	5.9	7.7	*
1977								
January	50.8	48.2	46.7	1.5	2.6	5.2	6.4	*
February	51.8	49.1	47.5	1.6	2.7	5.3	6.5	*
March	52.0	49.7	48.1	1.6	2.3	4.4	6.4	*
April	51.8	49.4	47.7	1.7	2.4	4.7	6.2	*
May	51.6	49.0	47.4	1.6	2.6	5.1	6.5	*
June	50.6	48.8	47.2	1.6	1.8	3.6	5.4	*
July	51.2	49.2	47.6	1.6	2.0	3.9	6.0	.1
August	52.3	50.0	48.3	1.7	2.3	4.4	6.6	.1
September	53.7	51.2	49.6	1.6	2.5	4.6	6.3	.1
October	52.6	50.0	48.5	1.5	2.6	4.9	6.1	.1
November	52.5	50.1	48.6	1.5	2.4	4.5	5.7	.1
December	52.2	50.0	48.5	1.5	2.2	4.1	5.5	.1
1977 Avg.	52.0	49.6	48.0	1.6	2.4	4.6	6.1	*
1978								
January								
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Avg.								

1/ *Computed from whole (unrounded) numbers.* *Series began January 1970.*

2/ *Non-additive - included in total employment.* *Revised to 1977 Benchmarks.*

* *Under 50.* *Current month preliminary.*

NOTE: Seasonally adjusted data are provided for statistical analysis only and should not be confused with actual numbers.

TABLE XV

MONTANA HOURS AND EARNINGS

For Private Nonagricultural Industries

December 1977

	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Dec. 1977	Nov. 1977	Dec. 1976	Dec. 1977	Nov. 1977	Dec. 1976	Dec. 1977	Nov. 1977	Dec. 1976
TOTAL PRIVATE	$198.18	$190.85	$175.78	35.2	34.7	35.8	5.63	5.50	4.91
MANUFACTURING	308.70	303.30	252.62	44.1	42.9	42.6	7.00	7.07	5.93
Durable Goods	316.80	309.29	256.08	45.0	43.5	43.7	7.04	7.11	5.86
Primary Metal Industries	315.87	308.83	279.11	40.6	39.9	40.1	7.78	7.74	6.96
Nondurable Goods	290.22	288.84	243.39	42.0	41.5	39.9	6.91	6.96	6.10
Food and Kindred Products	252.86	247.83	223.17	43.9	43.1	41.1	5.76	5.75	5.43
MINING	387.10	361.46	332.55	43.3	41.5	45.0	8.94	8.71	7.39
Metal Mining	459.69	403.60	338.10	44.5	40.0	44.9	10.33	10.09	7.53
CONTRACT CONSTRUCTION	376.29	412.18	329.73	33.9	37.1	39.3	11.10	11.11	8.39
TRANSPORTATION AND PUBLIC UTILITIES	315.75	315.84	284.41	42.1	42.0	42.6	7.50	7.52	6.68
Communications, Electric, Gas, Sanitary Services	278.21	277.01	256.28	41.4	41.1	42.5	6.72	6.74	6.03
WHOLESALE AND RETAIL TRADE	154.80	156.13	134.29	34.4	32.8	34.7	4.50	4.76	3.87
FINANCE, INSURANCE, AND REAL ESTATE	143.98	142.01	127.04	37.3	36.6	36.4	3.86	3.88	3.49
SERVICES	118.48	118.40	108.47	29.4	29.6	29.8	4.03	4.00	3.64

Data for current month are preliminary.
Averages are based on gross earnings, including overtime and premium pay.
Selected Industries series began January 1950; Total Private Sector series began January 1969 (May 1972 issue).
Prepared by U. S. Department of Labor, Bureau of Labor Statistics.

TABLE XVI

MONTANA LABOR TURNOVER RATES

In Manufacturing and Mining Industries

(per 100 employees)

November 1977

	ACCESSION RATES						SEPARATION RATES								
	Total			New Hires			Total			Quits			Layoffs		
	Nov. 1977	Oct. 1977	Nov. 1976	Nov. 1977	Oct. 1977	Nov. 1976	Nov. 1977	Oct. 1977	Nov. 1976	Nov. 1977	Oct. 1977	Nov. 1976	Nov. 1977	Oct. 1977	Nov. 1976
MANUFACTURING	1.8	4.6	2.3	1.3	4.4	1.9	4.1	3.5	3.9	1.3	2.0	1.6	2.3	.9	1.8
Durable Goods	1.4	1.9	1.6	.8	1.7	1.2	2.3	2.5	2.6	.6	1.3	1.1	1.3	.4	.9
Primary Metal Industries	1.0	1.4	1.6	.6	.8	.7	3.0	2.0	2.7	.5	.6	.5	1.6	.5	1.7
Nondurable Goods	2.6	9.7	3.4	2.1	9.4	3.0	7.1	5.4	6.0	2.4	3.2	2.4	4.1	1.7	3.0
MINING	2.9	3.7	.7	.6	2.6	.4	4.4	4.7	6.2	2.8	3.2	1.4	.4	.9	4.3
Metal Mining	1.8	2.0	1.1	.1	.1	.1	2.9	4.5	1.5	.1	.3	.3	1.2	2.6	.1

Prepared by U. S. Department of Labor, Bureau of Labor Statistics.
Series began January 1959.

TABLE XVII

NEW BUSINESS FIRMS IN MONTANA

BY INDUSTRY

New business firms in Montana are a reflection of economic activity within the business community. Data furnished on this page and the following page are an aggregate of information supplied by the office of the Montana Secretary of State and the Montana Employment Security Division. These data should in no way be construed as being absolute. They are presented to indicate business trends during the survey period.

The chart on the following page is a break-down by county and labor market area of business starts in Montana during the current month and year to date, with a comparison to the previous year.

The following chart is a break-down of new businesses by industry, with a comparison to last year.

Industry	Dec. 1977	Dec. 1976	Year to Date 1977	Year to Date 1976
AGRICULTURE, FORESTRY, AND FISHERIES	36	78	285	358
MINING	18	13	146	117
CONTRACT CONSTRUCTION	51	46	840	547
MANUFACTURING	15	8	210	139
TRANSPORTATION, COMMUNICATION, ELECTRIC, GAS, AND SANITARY SERVICES	6	15	168	121
WHOLESALE AND RETAIL TRADE	94	86	1223	782
FINANCE, INSURANCE, AND REAL ESTATE	26	32	429	303
SERVICES	111	96	1396	1052
GOVERNMENT	0	0	0	0
NOT ELSEWHERE CLASSIFIED	0	3	73	35
STATE TOTAL	357	377	4770	3454

TABLE XVIII

NEW BUSINESS FIRMS IN MONTANA

BY LABOR MARKET AREA

Areas	NEW BUSINESS FIRMS Dec. 1977	Dec. 1976	Year to Date 1977	1976
STATE OF MONTANA	357	377	4770	3454
GREAT FALLS SMSA	35	36	508	310
BILLINGS SMSA	60	64	781	583
ANACONDA-BUTTE LMA	19	22	314	254
Beaverhead	1	4	41	37
Deer Lodge	1	0	30	28
Granite	0	2	8	8
Madison	1	2	33	26
Powell	4	1	23	21
Silver Bow	12	13	179	134
BOZEMAN LMA	25	34	427	292
Gallatin	21	25	346	238
Meagher	0	0	5	6
Park	4	9	76	48
GLASGOW LMA	14	12	139	141
Daniels	1	2	15	31
Phillips	3	4	21	9
Roosevelt	3	3	29	39
Sheridan	4	1	27	24
Valley	3	2	47	38
GLENDIVE LMA	10	15	163	110
Dawson	2	4	47	34
Garfield	0	0	7	6
McCone	0	7	12	20
Prairie	0	0	17	7
Richland	8	3	78	41
Wibaux	0	1	2	2
HARDIN-RED LODGE LMA	8	9	102	90
Big Horn	4	2	34	20
Carbon	4	1	38	27
Stillwater	0	3	21	20
Sweet Grass	0	3	9	23

Areas	NEW BUSINESS FIRMS Dec. 1977	Dec. 1976	Year to Date 1977	1976
HAVRE LMA	17	20	157	127
Blaine	1	1	22	17
Hill	10	14	105	89
Liberty	6	5	30	21
HELENA LMA	34	23	381	233
Broadwater	1	2	22	14
Jefferson	3	4	22	14
Lewis and Clark	30	17	337	205
KALISPELL LMA	43	39	586	413
Flathead	30	24	397	270
Lake	5	12	105	92
Lincoln	8	3	84	51
LEWISTOWN LMA	5	10	106	73
Fergus	4	5	73	41
Golden Valley	0	0	3	4
Judith Basin	0	2	8	4
Musselshell	1	2	17	15
Petroleum	0	0	0	2
Wheatland	0	1	5	7
MILES CITY LMA	13	16	144	163
Carter	0	1	8	11
Custer	5	9	77	78
Fallon	2	2	15	21
Powder River	1	2	5	14
Rosebud	4	2	33	36
Treasure	1	0	6	3
MISSOULA LMA	47	50	757	491
Mineral	2	0	15	14
Missoula	38	35	578	361
Ravalli	4	7	114	59
Sanders	3	8	50	57
SHELBY-CUT BANK LMA	27	27	205	174
Chouteau	5	4	22	24
Glacier	5	9	45	48
Pondera	8	6	55	41
Teton	3	4	19	33
Toole	6	4	64	28

Source of data: State of Montana Employment Security Division, Research and Analysis Section; Montana Secretary of State.

UNEMPLOYMENT INSURANCE

UNEMPLOYMENT INSURANCE: CLAIM TO PAYMENT

Many of those persons who become separated from their jobs, enter our local Job Service offices for two reasons; to seek employment and to claim unemployment insurance (UI) benefits. Claimant wage credits obtained from insured employers are examined to determine if the claim meets monetary eligibility requirements for UI benefits and, if so, for how much per week and for how many potential weeks is the claimant qualified.* Monetarily eligible claims are subsequently segregated according to criteria for establishing which party (claimant or employer) was most responsible for the job separation in question. Claims for job separations resulting from claimant actions (issues) are further subjected to the test of whether or not an individual's reduction in his potential benefit duration is warranted. If otherwise eligible and if availability criteria continue to be complied with throughout his actual unemployment duration, weekly benefit payments will commence with the claimant's second week of unemployment (a waiting week must be served under the Montana Law). The number and amount of such payments by county are shown in the table on the following page. Interstate payments in the table refer to payments made to individuals who now reside in other states but who had established wage credits in Montana based employment. Amounts shown in the table are financed through employer taxes paid to the Montana UI Trust Fund Account.

* *If sufficient wage credits have been secured by a claimant from sources other than insured employment, he may be eligible for benefits which are financed wholly or partially from federal funds.*

TABLE XIX DISTRIBUTION OF UNEMPLOYMENT INSURANCE

DECEMBER 1977 COUNTY	NO. OF PAYS	INTRASTATE AMT. OF PAYS
BEAVERHEAD	216	17,147.00
BIG HORN	417	32,932.00
BLAINE	252	19,329.00
BROADWATER	124	8,853.00
CARBON	315	24,904.00
CARTER	77	6,501.00
CASCADE	3,840	296,821.00
CHOUTEAU	142	10,214.00
CUSTER	502	41,063.00
DANIELS	44	3,305.00
DAWSON	245	18,375.00
DEER LODGE	999	72,708.00
FALLON	62	5,144.00
FERGUS	454	34,581.00
FLATHEAD	2,594	199,410.00
GALLATIN	1,338	100,619.00
GARFIELD	32	2,339.00
GLACIER	638	47,328.00
GOLDEN VALLEY	21	1,794.00
GRANITE	108	8,228.00
HILL	557	43,733.00
JEFFERSON	472	38,486.00
JUDITH BASIN	150	11,794.39
LAKE	693	50,767.00
LEWIS & CLARK	1,943	157,050.00
LIBERTY	63	4,969.00
LINCOLN	1,006	76,003.00
MADISON	137	10,207.00
MCCONE	47	3,448.00
MEAGHER	90	7,167.00
MINERAL	325	26,016.00
MISSOULA	3,166	242,314.50
MUSSELSHELL	155	12,619.00
PARK	506	34,974.00
PETROLEUM	2	194.00
PHILLIPS	117	7,774.00
PONDERA	204	16,215.00
POWDER RIVER	9	822.00
POWELL	400	30,351.00
PRAIRIE	64	5,820.00
RAVALLI	966	71,148.50
RICHLAND	129	8,855.00
ROOSEVELT	239	15,985.00
ROSEBUD	453	37,173.00
SANDERS	598	48,542.00
SHERIDAN	60	4,076.00
SILVER BOW	2,606	200,230.00
STILLWATER	153	12,049.00
SWEETGRASS	63	4,971.00
TETON	181	14,609.00
TOOLE	188	14,309.00
TREASURE	48	4,447.00
VALLEY	678	54,880.00
WHEATLAND	80	5,393.00
WIBAUX	13	1,106.00
YELLOWSTONE	3,778	303,535.00
TOTAL FOR STATE	32,659	2,533,377.39
INTERSTATE	1,567	134,458.15
TOTAL	34,226	2,633,652.44

TABLE XX CUMULATIVE DISTRIBUTION OF UNEMPLOYMENT INSURANCE
JANUARY THROUGH DECEMBER 1977 INTRASTATE

COUNTY	NO. OF PAYS	AMT. OF PAYS
BEAVERHEAD	2,216	160,369.00
BIG HORN	4,276	320,836.00
BLAINE	2,328	162,817.00
BROADWATER	943	67,758.00
CARBON	3,032	228,282.00
CARTER	305	23,583.00
CASCADE	33,873	2,445,671.50
CHOUTEAU	1,336	92,846.00
CUSTER	4,595	367,221.00
DANIELS	454	34,022.00
DAWSON	3,109	228,016.00
DEER LODGE	10,263	789,882.00
FALLON	446	35,500.00
FERGUS	4,794	357,619.30
FLATHEAD	28,167	2,076,887.49
GALLATIN	14,702	1,088,783.00
GARFIELD	274	22,252.00
GLACIER	6,897	500,246.00
GOLDEN VALLEY	264	18,092.00
GRANITE	1,750	131,785.00
HILL	6,002	443,368.00
JEFFERSON	4,109	327,011.40
JUDITH BASIN	486	37,530.39
LAKE	8,340	575,644.00
LEWIS & CLARK	18,806	1,457,964.97
LIBERTY	320	21,998.00
LINCOLN	13,156	970,993.00
MADISON	1,403	94,018.00
MCCONE	483	33,985.00
MEAGHER	838	64,118.00
MINERAL	3,244	240,730.63
MISSOULA	38,153	2,749,401.00
MUSSELSHELL	2,724	208,562.00
PARK	5,727	391,752.48
PETROLEUM	51	3,281.00
PHILLIPS	1,642	111,770.00
PONDERA	2,042	151,556.00
POWDER RIVER	286	25,351.00
POWELL	3,901	304,370.00
PRAIRIE	622	51,847.00
RAVALLI	9,549	663,364.44
RICHLAND	2,054	150,121.00
ROOSEVELT	3,494	228,586.00
ROSEBUD	4,836	393,943.00
SANDERS	5,452	405,463.00
SHERIDAN	745	51,491.00
SILVER BOW	32,739	2,441,033.04
STILLWATER	1,615	128,911.00
SWEETGRASS	621	47,285.00
TETON	1,737	128,653.50
TOOLE	2,060	158,619.00
TREASURE	436	35,774.00
VALLEY	7,237	540,432.00
WHEATLAND	513	41,355.00
WIBAUX	297	18,371.00
YELLOWSTONE	42,978	3,351,831.79
TOTAL FOR STATE	352,772	26,202,953.98
INTERSTATE	24,640	2,468,316.98
TOTAL	377,412	28,637,087.86

TABLE XXI

SELECTED UNEMPLOYMENT INSURANCE ACTIVITIES IN MONTANA

YEAR-TO-DATE

	1977	1976	Net Change	Percent Change
Initial Claims[1/]	47,340	47,963	-623	*-1.3*
Continued Claims[1/]	443,169	467,666	-24,497	*-5.2*
Number of Benefit Payments[1/]	377,412	396,949	-19,537	*-4.9*
Amount of Benefits Paid[1/]	$28,637,087	$26,260,736	$2,376,351	*9.0*
Average Weekly Benefit Amount[1/2/]	$79.57	$70.87	$8.70	*12.3*

MONTHLY

	Dec. 1977	Nov. 1977	Dec. 1976	Change From Year Ago Net	Change From Year Ago Percent
Initial Claims[1/]	4,933	4,201	4,714	219	*4.6*
Continued Claims[1/]	49,386	33,843	42,322	7,064	*16.7*
Number of Benefit Payments[1/]	34,226	24,589	35,023	-797	*-2.3*
Amount of Benefits Paid[1/]	$2,633,652	$1,882,042	$2,517,121	$116,531	*4.6*
Average Wkly Benefit Amt[1/2/]	$80.81	$81.28	$70.87	$9.94	*14.0*
Trust Fund Balance	-$2,404,503*	$91,292*	-$358,047**	-$2,046,456	*-571.6*

1/ Regular Unemployment Insurance Program only.
2/ Derived according to definition in "Handbook of Unemployment Insurance Financial Data".
** Excludes loans from Federal Government, which amount to $9,284,089.*
*** Excludes loans from Federal Government, which amount to $1,366,089.*

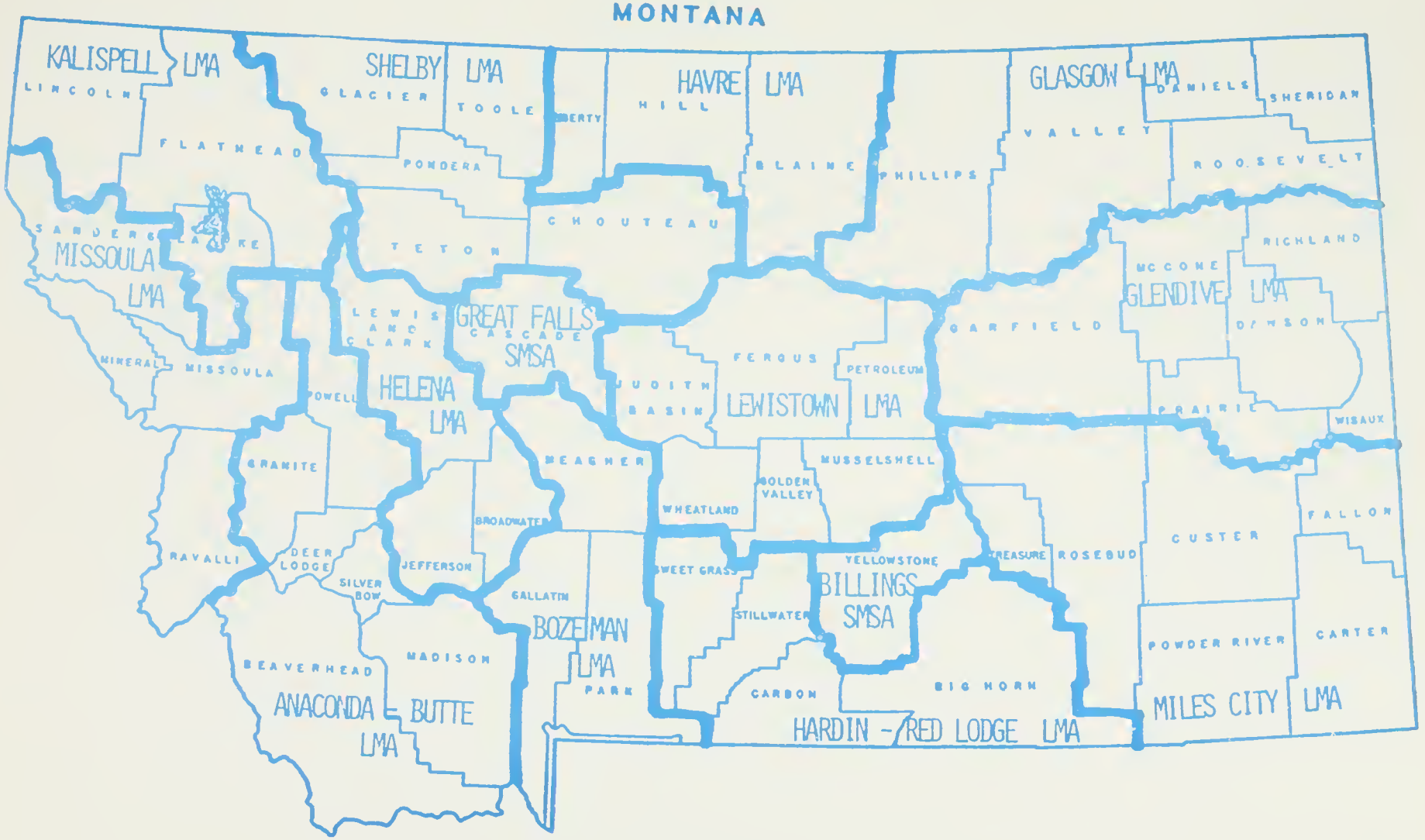
The initial and continued claims totals are continuing their usual upward trend due to the seasonality of our state. This is reflected by the increase from November to December. They also show an increase over December of a year ago. On the bright side, the end of the year totals for these two statistics show a decrease from one year ago.

The number of benefit payments and the amount of benefits paid show a significant increase from November to December of this year, but the number of benefit payments reflect a slight decrease from December of a year ago. The end of the year figures also reflect a decrease in the number of payments from last year, while inflation has caused an increase in the amount of benefits paid over last year.

The average weekly benefit amount dropped slightly from November, but increased from December of a year ago. The end of the year average weekly benefit amount finished well ahead of last year's figure.

The trust fund balance ended the year on the negative side and should remain there for the next few months due to increased benefit payments and a decrease in collections.

LABOR MARKET AREAS IN MONTANA



EMPLOYMENT SECURITY DIVISION
DEPARTMENT OF LABOR AND INDUSTRY
P. O. Box 1728
Helena, Montana 59601

OFFICIAL BUSINESS

POSTAGE AND FEES PAID
EMPLOYMENT SECURITY MAIL
LAB 449

The Montana State Employment Security Division maintains 23 local Job Service Offices in the principal cities of Montana. You are invited to call on any of these offices for assistance in filling positions in your organization, additional labor market information, and for other services in connection with your employment problems.